



**New Client Information Form**

Name \_\_\_\_\_

Company Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Mobile \_\_\_\_\_

Email \_\_\_\_\_

Company Website \_\_\_\_\_ Date Business Founded \_\_\_\_\_

EIN \_\_\_\_\_ State ID \_\_\_\_\_

Do you have a partner \_\_\_\_\_ Partner Name \_\_\_\_\_

Does your company sell a product \_\_\_\_\_ What type \_\_\_\_\_

Is someone currently handling your bookkeeping \_\_\_\_\_

If yes, Who? \_\_\_\_\_

Name of Software you are using \_\_\_\_\_

How may Brooks Books help you \_\_\_\_\_

<b>Bookkeeping</b>		<b>QuickBooks</b>		<b>New Business</b>	
<b>Payroll</b>		<b>Reports: State or Federal</b>		<b>Training</b>	
<b>Sales Tax</b>		<b>Consolidation</b>		<b>A/P or A/R</b>	

Other Assistance needed? \_\_\_\_\_

\_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_