



SO EFFICIENT
ACCOUNTING SERVICES

Prospective Client Questionnaire

Date	Website URL
Company Name	Phone Number
Address	Entity Type
City	Year Established
Postal Code	Referred By
Owner/ Principal	CPA Contact
E-mail Address	CPA Firm

Business Details

Number of Bank Accounts	Number of Loan Accounts	Number of Credit Cards
Number of Employees	Number of Cheques written per month	

Comments: