



Thank you for your interest in AccountPro Services LLC. The details below help us prepare an accurate quote for your bookkeeping or accounting needs. All information is kept confidential.

1 BUSINESS INFORMATION

BUSINESS LEGAL NAME

DBA / TRADE NAME

INDUSTRY / BUSINESS TYPE

STATE OF FORMATION

YEAR ESTABLISHED

ENTITY TYPE

- ☐ Sole Proprietor ☐ Single-Member LLC ☐ Multi-Member LLC ☐ Partnership
☐ S Corporation ☐ C Corporation ☐ Nonprofit / Tax-Exempt ☐ Other

BUSINESS ADDRESS

CITY

STATE

ZIP

BUSINESS PHONE

BUSINESS EMAIL

WEBSITE

2 PRIMARY CONTACT

CONTACT NAME

TITLE / ROLE

MOBILE PHONE

CONTACT EMAIL

BEST TIME TO REACH

PREFERRED CONTACT METHOD

☐ Phone

☐ Email

☐ Text Message

3 SERVICES REQUESTED

SELECT ALL THAT APPLY

- ☐ Monthly Bookkeeping ☐ Quarterly Bookkeeping ☐ Catch-Up / Cleanup
☐ Bank & Credit Card Reconciliations ☐ Financial Statements ☐ Accounts Payable / Receivable
☐ Payroll Processing ☐ Sales Tax Filing ☐ 1099 Preparation
☐ Business Tax Preparation ☐ Budgeting / Cash Flow ☐ Other

DESIRED START DATE

IF OTHER, PLEASE DESCRIBE

OFFICE USE ONLY - QUOTE

VOLUME TIER

☐ Tier 1

☐ Tier 2

☐ Tier 3

☐ Tier 4

☐ Custom

MONTHLY FEE

ONE-TIME CLEANUP FEE

PREPARED BY

QUOTE DATE



4 VOLUME & CURRENT BOOKS

Your pricing tier is based on the volume details in this section. Please estimate as closely as you can.

CURRENT ACCOUNTING SOFTWARE

☐ QuickBooks Online ☐ QuickBooks Desktop ☐ Xero ☐ Wave
☐ Spreadsheets ☐ Other ☐ None

ACCOUNTING METHOD ☐ Cash ☐ Accrual ☐ Not Sure

CONDITION OF BOOKS ☐ Up to date ☐ 1-3 mo. behind ☐ 4-12 mo. behind ☐ 12+ mo. behind

APPROX. MONTHLY TRANSACTIONS ☐ Under 50 ☐ 50 - 150 ☐ 151 - 300 ☐ Over 300

APPROX. ANNUAL REVENUE ☐ Under \$100K ☐ \$100K-\$500K ☐ \$500K-\$1M ☐ Over \$1M

OF BANK ACCOUNTS

OF CREDIT CARDS

OF LOANS / LINES OF CREDIT

FISCAL YEAR END

DO YOU CARRY INVENTORY? ☐ Yes ☐ No

5 PAYROLL, CONTRACTORS & SALES TAX

DO YOU HAVE EMPLOYEES? ☐ Yes ☐ No

NUMBER OF EMPLOYEES

PAYROLL PROVIDER

PAY FREQUENCY

DO YOU PAY 1099 CONTRACTORS? ☐ Yes ☐ No

NUMBER OF CONTRACTORS

DO YOU COLLECT SALES TAX? IF SO, IN WHICH STATES?

6 ADDITIONAL INFORMATION

HOW DID YOU HEAR ABOUT US?

MONTHLY BUDGET FOR SERVICES (OPTIONAL)

ANYTHING ELSE WE SHOULD KNOW ABOUT YOUR BUSINESS OR BOOKS?

7 ACKNOWLEDGMENT

I confirm the information above is accurate to the best of my knowledge. I understand this form is a request for a quote only and does not create an engagement with AccountPro Services LLC.

PRINTED NAME

SIGNATURE

DATE