

.....

LAW FIRM

Name: _____

Phone: _____

Email: _____

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**ALTERNATE AUTHORIZED
CONTACT IN YOUR
COMPANY**

Name: _____

Phone: _____

Email: _____

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PREVIOUS BOOKKEEPER

Name: _____

Phone: _____

Email: _____

Description of your business and operating activities

(Please give as much details as you can give)

Name of accounting system in use: _____

Date of last completed tax return: _____
mm *yyyy*

Date of most recent posted transactions: _____
mm *yyyy*

Name of person who handles administrative paperwork: _____

Please check the services you think your business needs

CONSULTING

- Bookkeeping Start-up
- Bookkeeping Systems and Procedure Set up/Review
- Software Introduction or Integration

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CUSTOMIZED COACHING

One on one Group

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BOOKKEEPING SERVICES

On Site Off Site

Do you use a customized invoice system? Yes No

If yes, how many invoices per month do you issue? _____

Bank Reconciliations - How many bank accounts? _____

How many pages on each statements? _____

GST - Remittance Period? _____

PST - Remittance Period? _____

Inventory Control Cash Flow Management

Special Report Requirements

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PAYROLL SUPPORT

How many Employees? _____

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OTHER

Please Describe: _____

.....

When would you be ready to get started: _____

dd mm yyyy

Name areas of your current bookkeeping that is working well for you:

Name 3 areas of your current bookkeeping that require improvement:

The cost of our services

It is our experience that businesses that invest in bookkeeping actually save money by reducing government fines and fees. At *Digits & Decimals Inc.*, consulting and coaching services start at **\$125 per hour** and we offer basic monthly bookkeeping packages starting at **\$595 per month + HST**. Each client is different and the price will depend on your business' needs. We look forward to discussing a plan with you.

Is there anything else you think we should know about your business?

Where did you hear about us?

Submitted By: _____ Position : _____

Signature (if by fax): _____ Date: _____
dd mm yyyy

Digits & Decimals Inc.
203-2642 Main Street
Vancouver, BC
V5T 3E6

- T** (604) 662-3964 **F** (604) 709-9146
- E** info@digitsdecimals.com
- W** www.digitsdecimals.com

Digits & Decimals Inc. is a member of the *Canadian Bookkeepers Association (CBA)*.
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