

Date of last completed tax return:
mm *yyyy*

Date of most recent posted transactions:
mm *yyyy*

Which accounting software is currently in use: _____

Do you use a separate invoicing system? Yes No

If yes, which one? _____

Does your system require further set-up? Yes No

If yes, in which areas is the set-up needed? _____

Please check type of coaching you think you need

System Set-up Bank Reconciliation Payroll Processing GST Filing PST Filing

Inventory Control & Set-up Invoicing & Account Receivable Special Reporting

Expense & Accounts Payable Processing Multiple Currency Procedures

Year-End Closing Processing Other: _____

How many employees need coaching? _____ Do they require coaching because:

The company has recently purchased new accounting software?

They are new to the company? They are new to bookkeeping?

How long have the trainees been using the software: _____

What is the trainees' current knowledge of accounting/full cycle bookkeeping?

When would you be ready to get started:
dd *mm* *yyyy*

When do you want to be completed?
dd *mm* *yyyy*

What are your expectations for the outcome of the coaching?

The cost of our services

It is our experience that businesses that invest in bookkeeping coaching actually save money on government fines and fees. At *Digits & Decimals Inc.*, coaching and consulting services start at **\$125 per hour + HST**. Each client is different and the overall price will depend on your 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

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