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|  | Client welcome needs assessment |

Please take a moment to complete this two-part needs assessment:

Part 1

What key personal/business goals/objectives can we help you with?

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What personal/business issues/challenges can we help you with?

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Part 2

To help us better serve you, please indicate which of these services you are already using our firm for, which of these services you are using another firm for and which of these services you would like more information about.

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| --- | --- | --- |
| **Category** | **Symbol** |  |
| Is already using our firm |  |  |
| Is using another firm  |  | Replace competitor with firm name if known |
| Is a prospect for our firm |  |  |

**Note:** This list is included for illustration purposes. Please add to and delete from this list where applicable.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Firm services |  |  |  |  |  | **#1 - Client Name** |
| Accounting, assurance and audit services |  |  |
| Financial reporting (audits, review and compilation) |  |
| General ledger maintenance, monthly accounting and controllership services |  |
| Internal controls |  |
| Agreed-upon procedures |  |
| GIPS verification services |  |
| Client accounting services |  |
| Tax planning and compliance |  |
| *Individual taxation* |
| Tax compliance |  |
| Tax planning |  |
| Stock option planning |  |
| Retirement planning |  |
| Trust, estate and gift tax compliance and planning |  |
| *Business taxation* |
| Corporate, S-Corp, partnership, LLC and non-profit tax compliance |  |
| Multi-state returns and nexus studies |  |
| Consolidated returns |  |
| Business sales and acquisition structuring |  |
| Corporate restructuring and liquidation |  |
| Property tax strategy |  |
| Entity selection |  |
| R&D credit study |  |
| Enterprise zone credit study |  |
| *IRS/state tax authority management ate tax authority management* |
| Representation before federal and state tax authorities |  |
| Resolution of audit issues |  |
| Response to correspondence inquiries |  |
| Wealth and advisory planning services |  |
| Succession plans and goal setting |  |
| Wealth transfer techniques |  |
| Management of family-owned assets and businesses |  |
| Investment policy statements |  |
| Life insurance review and analysis |  |
| Employee benefit analysis |  |
| Retirement plan design and implementation |  |
| Sophisticated income tax planning techniques |  |
| Business owner/key executive deferred compensation strategies |  |
| Business consulting services |  |
| Business valuations |  |
| Mergers and acquisition advisory |  |
| Litigation support and marital dissolution |  |
| Receivership, liquidation and wind-down services |  |
| Part-time or interim CFO services |  |
| Debt restructuring assistance |  |
| Forensic accounting |  |
| Technology strategy |  |
| Business strategic planning/business model review |  |
| Human resource management |  |

A member of our team will contact you shortly if you requested more information about a particular product or service.

Please complete your name and contact information before submitting your response. Thank you for taking the time to provide us with this information.

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| **Your name** |  |
| **Your business’ name** |  |
| **Your phone** |  |
| **Your email** |  |