



Prepaid Accounting Services Client Questionnaire

General Information Today's Date: _____

Name: _____ Spouse Name: _____

Address: _____

Date of Birth: _____ Date of Birth: _____

Home Phone: _____ Cell Phone: _____ Bus Phone: _____

Email: _____

Business website (if applies) _____

Marketing Information (Let Us Learn From YOU!)

How did you hear about us? _____

General Information

What area(s) of finance (i.e. taxes, accounting, business consultation) are you seeking information? (List as many as apply)

Are you self employed? Yes or No (circle one)

If yes, what is the business industry? _____

What is your best method of contact? Phone Email Text (circle one)

Let us know about you:

What is your expectation from the prepaid accounting subscription service?

What other services can we provide to you? (circle all that apply)

Tax Preparation Accounting Bookkeeping Business Consultation

Billing Information

The prepaid accounting subscriptions are offered in the following packages:

- Individual \$15 per month (+ one time \$10 set up fee)
- Small Business (1-20 employees) \$30 per month (+one time \$10 set up fee)

Plans must be pre-paid for the year, or billed to credit card, or monthly debit electronic withdrawals.

*******Please Verify That This Billing Information Is Correct*******

Credit/Debit Card #: _____ Exp. Date _____

Card Type: Master Card or Visa Validation # _____ (three digits on back of card)

What day of the month would you like to be billed for the monthly service _____

After we receive the information, a staff member will be assigned to your account and will contact you personally to introduce themselves and review the questionnaire with you.

You can fax or email the information to us.

We look forward to working with you and Welcome to World Wide Tax Services, Inc.!