



## Quick Start Worksheet

Please take a few minutes and answer the following questions.

<b>Name:</b>	<b>Company:</b>	<b>Email:</b>	<b>Phone:</b>
I sell a:	Product Service Both	I pay bills with:	Cash Check Charge
I accept:	Cash Check Charge	Number of checking accounts:	
My terms:	COD Net 30 Other	Number of credit cards:	
My invoices are:	Handwritten Computer generated	Number of employees I need payroll for:	
I need to issue statements:	Yes No	My tax ID/EIN is:	
I have a:	Scanner Fax Both	My state ID is:	
I currently keep my books in:	QuickBooks a shoe box other	My credit card statements are available online:	Yes No
I am taxed as a:	Sole proprietor Corporation Pass through (Sub-S/partnership)	I want to use purchase orders:	Yes No
I want to use budgeting:	Yes No	I keep inventory:	Yes No
		I want you to prepare:	Payroll tax returns Sales tax returns Both -- Neither
		Number of owners/shareholders:	
		Number of states I/we do business in:	
		I use/want to use online banking:	Yes No

When you have completed this form, fax it to 608-531-4609 or email it to [custsvc@livbookkeeping.com](mailto:custsvc@livbookkeeping.com). Within 24 hours of receipt, a Client Service Provider (CSP) Agreement will be emailed to you at the address you have listed on this form. Please review it carefully. A Customer Service representative will call you at the number you have listed on this form within 24 hours of sending you the CSP agreement to address any questions you may have.