VuLedger
BOOKKEEPING SERVICE

Client Consultation Form

Free | no obligation | about 10 minutes

Prefer not to book a call? Tell me about your business and what you need here. I will review your answers and statements and email you a **written quote within 24 hours** of receiving both. Monthly plans start at $250.

How to fill it out: type in the shaded boxes, click the circles and squares to choose, save a copy, then email it to **hvu.accounting@yahoo.com** with **6 to 12 months of statements** attached (at least 6, and back to January 1 if you want this year caught up).

Please do not enter passwords, full account numbers, or Social Security numbers on this form. I will never ask for your passwords.

1. About you and your business

Your full name

Business name

Email

Phone

Business address (city, state, and ZIP are fine)

How is your business set up?

◯ Sole proprietor ◯ LLC ◯ S-corp ◯ C-corp ◯ Partnership ◯ Not sure

What does your business do, and how long have you been operating?

Who do you pay?

☐ Just me, no one else ☐ Employees on payroll ☐ Contractors (1099)

How would you like me to reach you?

◯ Email ◯ Phone call ◯ Text message

Best days and times to reach you

2. Your current books

Who keeps your books today?

◯ I do it myself ◯ Family or a friend ◯ Another bookkeeper or accountant ◯ No one right now

Do you use QuickBooks Online?

◯ Yes ◯ No ◯ I use other software

QuickBooks Online costs around $30–50 per month, paid directly to Intuit. It is separate from my fees, and I can help you set one up.

If you use other software, which one?

If you have QuickBooks, should I use your current file or start a new one?

◯ Use my current file ◯ Start a new one ◯ Not sure, please advise

Do you work with a CPA or tax preparer?

◯ Yes ◯ No

Their name and email (so I can share reports with your OK)

3. Accounts and volume

How many of each do you want included?

Business bank accounts	Business credit cards	Loans or financing	PayPal, Venmo, Cash App, etc.
Select	Select	Select	Select

List each account (for example: Chase business checking, Amex Blue Business card). No full account numbers, please.

About how many transactions per month across all accounts?

◯ Under 50 ◯ 50–100 ◯ 101–200 ◯ 201–300 ◯ Over 300 ◯ Not sure

Which of these apply to your business?

☐ Payroll service (Gusto, ADP, Paychex, etc.)
☐ POS or card processor (Square, Stripe, Clover, Shopify, etc.)
☐ Loan or financing statements
☐ I collect sales tax
☐ Business and personal spending are mixed
☐ Many cash transactions

Names of your payroll or POS systems

4. What you need help with

Check everything that applies:

- ☐ Monthly bookkeeping and reports
- ☐ Invoicing, bill entry, and payment tracking
- ☐ QuickBooks setup
- ☐ Cleanup or catch-up of prior months
- ☐ Year-end close for my tax preparer
- ☐ Not sure, please recommend

What is your biggest bookkeeping headache right now? What would a good result look like in a few months?

5. Timing and catch-up

How would you like to begin?

◯ Start fresh from a set month ◯ Catch up on prior months, too ◯ Not sure

Desired start month

Catch up from (month/year)

Catch up through (month/year)

Were those prior months ever reconciled?

◯ Yes ◯ No ◯ Not sure ◯ Not applicable

Any upcoming deadlines? (tax filing or extension, loan application, etc.)

Send 6 to 12 months of statements for each account. I base your quote on your last 3 months.

- ☐ I am emailing statements with this form
- ☐ I will send statements separately

6. A little more

Anything else I should know?

How did you hear about VuLedger?

Date completed

What happens next

1. Email this form and 6 to 12 months of statements to **hvu.accounting@yahoo.com**.

2. Within 24 hours of receiving both, I will email you a written quote. It covers onboarding, any catch-up work, and your first month. Quotes are valid for 30 days.

3. If you would like to go ahead, you pay the quote in full and sign my engagement letter.

4. Service starts once I receive your payment. After the first month, invoices go out on the 1st and are due by the 15th.

Sending this form is free and creates no obligation. I keep your information confidential and use it only to prepare your quote.