



JskiEXPRESS

Express Bookkeeping

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Bookkeeping Onboarding Questionnaire

Full Name:

- Email:
- Phone Number (Work):
- Phone Number (Cell):

Business Name:

Business Address:

Business Structure:

- Sole Proprietorship
- Partnership
- LLC
- Corporation
- Other (please specify)

Business Type (Attorney, ECommerce, Dentist, Contractor etc):

Products Sold if applicable:

Software and Systems: Current Bookkeeping Software (if any):

- QuickBooks
- Other (please specify)
- APPS/Applications (Non-Bookkeeping) used in the business i.e. inventory/mileage tracking etc.

Estimated monthly Gross Income?

Estimated monthly Expenses?

Estimated monthly Clients?

Number of Bank Accounts/Credit Cards?

Business Processes:

Describe your invoicing process:

- How are invoices generated?
- Frequency of invoicing?
- Payment terms?

Describe your receipts process:

- How are receipts generated?
- Frequency of receipts?

Expense Tracking:

- How are expenses currently tracked?
- Categories for expenses?

Payroll Information (if applicable):

- Payroll provider (if any):
- Frequency of payroll runs:
- Number of employees:

Bookkeeping Service Needs: What are you interested in? (Check all that apply)

- General Ledger Maintenance
- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Payroll Processing
- Financial Reporting
- Budgeting and Forecasting
- Tax Preparation Support
- Accountant and CPA referral
- Other (please specify)

Are there specific reports you would like us to generate regularly?

Any specific challenges or pain points in your current bookkeeping processes that you would like us to address?

Communication Preferences: Preferred Method of Communication:

- Email
- Phone (work or cell)
- Other (please specify)

Thank you for taking the time to complete this questionnaire. Your responses will help us understand your business needs and tailor our bookkeeping services accordingly. If you have any additional documents or information to provide, please attach them to this questionnaire. Please email the completed document to jskiexpress@gmail.com.