

LivingstonCPA's Needs Assessment for New Business Clients

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Please check which services you would like us to perform:

Monthly Services:

- Bank statement reconciliation
- Florida Sales tax return for monthly filers and payment, if electronically filed *
- Payroll tax deposit preparation
- Financial Statement Preparation
- Other - please specify:

Quarterly Services:

- Quarterly payroll tax returns (Form 941 and FL UCT-6) *
- Florida Sales tax return for quarterly filers and payment, if electronically filed *
- Financial Statement Preparation (if not monthly or annually)
- Other - please specify:

Annual Services:

- Preparation of W-2s and 1099s for employees and vendors, respectively
- Financial Statement Preparation and/or review for tax purposes *
- Annual payroll tax returns *
- Federal tax return for business *
- State tax return for business *
- Intangible property tax return for business *
- Tangible personal property tax return for business*
- Applicable personal tax returns (non-business) *
- Other - please specify:

* Designated tax-preparation services are billed at an hourly rate of \$100. All other services listed qualify for an accounting rate of \$35/hour. These rates are applicable for 2004 and may be subject to annual increases not to exceed industry norms.

Note: Contact information on next page.

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Provide the following information:

Full Name _____

Business Name _____

Work Phone _____

Alternate Phone _____

Email Address _____

- Do you check email at least twice a week? Yes No
- May LivingstonCPA send tax-related questions and correspondence via email? Yes No
- In future years, may I send my annual tax mailer via email instead of paper mail? Yes No
- Do you want to file your return electronically?
If so, a paper copy will be given to you for your review prior to e-filing. Yes No
- Do you want to have any refund direct deposited?
If so, please enclose a voided check or deposit slip for the deposit account. Yes No

Please fax or mail completed form to:

LivingstonCPA
1335 Lakewood Road
Jacksonville, Florida 32207

(904) 887-7519 - Phone
(904) 398-6507 – Fax

<http://www.livingstoncpa.com>
Samantha@livingstoncpa.com

If you have any questions please feel free to contact us.