

AccounTax DIY Price Quote For Accounting Services

For a firm written proposal, please complete this form and fax or email it to Terri Launhardt. Terri will send you a written proposal and price quote.

We will never bother you with a follow up sales call

ACCOUNTING FEE CHECKLIST

Accounting Frequency Desired: Monthly Quarterly Other (circle one)

S Corporation C Corporation LLC/Partnership Schedule C (circle one)

How Many Bank Accounts to Reconcile ? _____

Are there any Mutual Fund or Stock Accounts ? _____ No _____ No

Method of Accounting: Cash Simple Accrual Full Accrual (circle one)

Chart of Accounts: Standard Custom But Simple Custom But Complex (circle one)

Financial Statements: Standard Custom But Simple Complex Departmental (circle one)

Loans With Monthly Amortization ? _____ Yes (How Many _____) _____ No

Do You Need Us To Prepare 1099s ? _____ Yes (1-5) _____ Yes (6+) _____ No

Payroll ? _____ Yes _____ No _____ Payroll Service

Do You Have City Payroll ? _____ Yes _____ No

More Than One State ? _____ Yes _____ No

Payroll Checks Per Average Month _____ (Use 3-6 month average)

Non-Payroll Checks Per Average Month _____

Total Number of Checks Per Average Month _____

Payroll Check Deductions: Standard Extra But Simple Extra But Complex Tips/Union (circle)

Who Prepares Payroll Tax Deposits? _____ N/A _____ Client _____ AccounTax _____ Payroll Serv

Sales Tax ? _____ Yes _____ No More Than One State ? _____ Yes _____ No

Use Tax ? _____ Yes _____ No More Than One State ? _____ Yes _____ No

Will You Code Your Check Stubs With Account Codes ? _____ Yes _____ No

Turn Around Time Desired? _____ 2 days _____ 7 days _____ 14 days

How do you want your proposal sent ? Fax Number : _____

Email address: _____

Mailing Address _____
