



**GINERIS & ASSOCIATES , LTD.**  
ACCOUNTANTS , TAX & FINANCIAL CONSULTANTS

*Your Success Is Our Business*

# **Prospective Client Information Request**

Thank you for reaching out to us. We appreciate the opportunity to work for you. Below is a request for information about your company. We have provided some information about our firm as well.

We will contact you promptly after we receive the requested information.

# Tell us about your business

| <b>General Business Information</b> |  |
|-------------------------------------|--|
| Company Full Legal Name             |  |
| Address                             |  |
| City, State and ZIP                 |  |
| Business Phone                      |  |
| Business Fax                        |  |
| Business Web Address                |  |
| Business Legal Structure            |  |
| Year Business Started               |  |
| Primary Business Activity           |  |
| State Organized In                  |  |
| States that you do business in      |  |
| Who referred you to us?             |  |

| <b>Primary Business Contact Information</b> |  |
|---|--|
| Primary Contact Name                        |  |
| Primary Contact Title                       |  |
| Mobile Phone                                |  |
| Other Phone                                 |  |

| <b>Company Internal Bookkeeper</b>             |                          |
|--|--------------------------|
| Check if the primary Contact is the bookkeeper | <input type="checkbox"/> |
| Bookkeeper Name (If not primary contact)       |                          |
| Bookkeeper Phone (if not primary contact)      |                          |
| Bookkeeper Email (if not primary contact)      |                          |

| <b>Payroll Information</b>                 |  |
|--|--|
| Number of employees                        |  |
| Frequency of Payroll                       |  |
| Does the company provide health insurance? |  |
| Does the company have a retirement plan?   |  |
| Does the company have union employees?     |  |
| Does the company have a cafeteria plan?    |  |
| How is the payroll prepared?               |  |

| <b>Sales information</b>                   |  |
|--|--|
| Do you collect sales tax?                  |  |
| If yes, in what state(s)?                  |  |
| Name of person preparing Sales tax returns |  |

| <b>How Can we help you?</b>     | <b>Please check all that apply:</b> |
|---------------------------------|-------------------------------------|
| Unhappy with current accountant | <input type="checkbox"/>            |
| Tax agency troubles             | <input type="checkbox"/>            |
| Started a new business          | <input type="checkbox"/>            |
| Need Comprehensive Tax Planning | <input type="checkbox"/>            |
| Need Financial Planning         | <input type="checkbox"/>            |
| Need Other Business Planning    | <input type="checkbox"/>            |
| Other                           | <input type="checkbox"/>            |
| Explain "Other"                 |                                     |

## Services

- Every business is unique. We tailor our services to meet your unique needs. What's important and relevant to one business owner may not matter to another.
- We provide professional accounting services – including tax preparation, payroll, bookkeeping, and other standard compliance work. However, the real value you get when working with Gineris & Associates comes from our professional advisory and value-added services – including business planning and advising, business best practices, income strategies, tax strategy and planning, and financial planning.
- Services that we do not provide – but which we will happily refer or connect you with trusted partners – include attestation services (audits or opinions on financial statements), valuations, benefit plan administration, and legal services.

## Service model

- Our business model is not a transaction-based, hourly-based, fee-for-service model. Our experience tells us that the best-fit clients want us to do their compliance work (payroll, tax reports) and prepare and review their financial statements; they use our cloud-based accounting system; and they prefer paying a fixed monthly fee for all stipulated services (which includes regular contact related to those services). This provides predictability and optimal value. Clients can call us whenever they need without the worry of being nicked and dimed.
- We value ongoing relationships with our clients, and we value real-time communication, collaboration and sharing of vital tax, business, and financial information. We provide the best service when we both work proactively. We are more than happy to help a new client out of a tax crisis, with the intention of providing valuable ongoing services to that client. We seek to forge long-term win-win relationships.
- We provide systems and services that enable us to have real-time monitoring of a client's financial performance. We monitor the vital signs of your company's health.
- We invest in our clients in the front-end to set up efficient, effective financial and accounting practices and to help clients understand: best financial practices, the tax and business implications of decisions and work processes, and most importantly, the bottom line – what the numbers really mean and how to use them.

# Fees

- Our clients generally pay an up-front set-up fee which includes completing any catch-up work, setting up the accounting systems and processes, and planning, among other needed initial services.
- Additionally, clients pay monthly fees for ongoing services, ranging from \$250 to >\$1,000 based on the client needs. The monthly fee includes all agreed upon services, and is reviewed annually.
- We value transparency. Therefore, prior to commencing any services, we clearly communicate the engagement with you and mutually agree on the up-front and monthly fees.
- Our tax preparation services are not provided as a stand-alone service to businesses. Rather, for our ongoing business clients, we prepare individual and entity tax returns, per the agreed-upon engagement we have with them.
- Consultations provided to prospective new clients, and to existing clients on topics outside the scope of our current retained services, are billed based on the professional's billing rate, starting at \$150 per hour for associate tax professionals.

Prior to commencing any business services, we must have a payment method on file - either bank draft or credit card. Tax returns and all previous balances must be paid in full at the time of tax return pick-up and prior to electronic transmission. We accept credit cards, bank drafts, and checks. Please sign to acknowledge your understanding of these terms.

After digitally signing and saving this completed form, please email to [Tax@GinerisLtd.com](mailto:Tax@GinerisLtd.com). Thank you.