



## Quick Start Worksheet

Please take a few minutes and answer the following questions.

Name:	Company:	Email:	Phone:
I sell a:	Product Service Both	I pay bills with:	Cash Check Charge
I accept:	Cash Check Charge	Number of checking accounts: Number of credit cards:	
My terms:	COD Net 30 Other	Number of employees I need payroll for: My tax ID/EIN is: My state ID is:	
My invoices are:	Handwritten Computer generated	My credit card statements are available online:	Yes No
I need to issue statements:	Yes No	I want to use purchase orders:	Yes No
I have a:	Scanner Fax Both	I keep inventory:	Yes No
I currently keep my books in:	QuickBooks a shoe box other	I want you to prepare:	Payroll tax returns Sales tax returns Both -- Neither
I am taxed as a:	Sole proprietor Corporation Pass through (Sub-S/partnership)	Number of owners/shareholders: Number of states I/we do business in:	
I want to use budgeting:	Yes No	I use/want to use online banking:	Yes No

When you have completed this form, fax it to 231-402-3308 or email it to [custsvc@livbookkeeping.com](mailto:custsvc@livbookkeeping.com). Within 24 hours of receipt, a Client Service Provider (CSP) Agreement will be emailed to you at the address you have listed on this form. Please review it carefully. A Customer Service representative will call you at the number you have listed on this form within 24 hours of sending you the CSP agreement to address any questions you may have.