

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 _____
