



BUSINESS DETAILS

Legal business name *

Doing business as (DBA)

Entity type

☐ Sole proprietor ☐ LLC ☐ S corporation ☐ C corporation ☐ Partnership ☐ Nonprofit

EIN

Industry

Street address

City

State

ZIP

Main contact name *

Email *

Phone

Fiscal year end (month)

Owners (name, title, % ownership)



SERVICES WANTED

Services *

☐ Bookkeeping ☐ Payroll

Preferred start date

Current accounting software

☐ QuickBooks Online ☐ QuickBooks Desktop ☐ Xero ☐ Wave ☐ Spreadsheets ☐ None ☐ Other

Where are your books today?

☐ Up to date ☐ Behind 1-3 months ☐ Behind 3+ months ☐ Starting fresh

Anything else we should know?

BANK & CARD ACCOUNTS

List the last 4 digits only. Never include full account numbers or passwords.

Bank, card and loan accounts (institution, type, last 4)

PAYROLL DETAILS

Number of employees

Number of 1099 contractors

Pay schedule

☐ Weekly ☐ Bi-weekly ☐ Semi-monthly ☐ Monthly

States where employees work

Current payroll provider

First payroll with Frontline



FRONTLINE FINANCIAL SOLUTIONS

Accurate Books. Stronger Business. Better Future.

CLIENT INTAKE FORM

Benefits & deductions (health, 401k, garnishments)

SIGNATURE & CONSENT

☐ I confirm this information is accurate and authorize Frontline Financial Solutions to use it to set up my services.

Signature (type your full name) *

Title

Date *
