

AEL Consulting, Inc.
Potential New Client Questionnaire

1. Do you currently have an accountant or did you have an accountant who prepared your prior year tax returns? If yes, move to question 2. If no, move to question 3.

2. Why are you seeking to hire a new accountant?

3. What are your top 3 considerations for hiring a new accountant? For example, seeking more interaction/help from my accountant, lowering my costs for accounting services, need quarterly or semi-annual tax planning to avoid surprises in April, recently moved to the area and looking for someone local, etc. There are no wrong answers.

4. If lowering your costs is one of your answers to #3 above, please detail what you paid for your tax and accounting services last year. Estimates are fine, perfection is not necessary.

5. What tax and accounting services do you need on an annual basis? For example, business tax preparation, individual tax preparation, quarterly tax planning, monthly accounting, preparation of financial statements, etc. Please try to list all services.

6. How do you like to communicate with your accountant? Primarily by phone, email, or in person?

7. Are you accustomed to and/or open to sending and receiving data through a secure portal?