



*Jennifer Young's Bookkeeping Services LLC*

**New Client Intake Form**

Please fill out and sign at the bottom.

Email completed form to [jennifer@jennifersbooks.com](mailto:jennifer@jennifersbooks.com)

Or bring to: 2200 South Plaza Dr #1

Call (605) 787-3230 with questions

Name: \_\_\_\_\_

Social \_\_\_\_\_

Phone \_\_\_\_\_

Employer \_\_\_\_\_

Spouse \_\_\_\_\_

Social \_\_\_\_\_

Phone \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

Health Insurance thru the marketplace?

Yes / No Who: \_\_\_\_\_

COMPANY INFORMATION:

Legal Name of Business

EIN

Address

Phone

City, State, Zip

Email

Owner \_\_\_\_\_ %

Owner \_\_\_\_\_ %

Owner \_\_\_\_\_ %

Owner \_\_\_\_\_ %

Accounting Program

Business Bank Account

Username

Username

Password

Password

EFTPS

SUTA

Due

Pin \_\_\_\_\_

Password \_\_\_\_\_

Sales Tax/ Excise Tax State \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

Other \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

Other \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

Other \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

Other \_\_\_\_\_

Username \_\_\_\_\_

Password \_\_\_\_\_

Other \_\_\_\_\_

Please Check All Services Needed

- Initial Consultation**.....Free
- Payroll.....\$40 per each payroll ran
- Payroll Program.....\$25 a month
- Payroll Taxes.....\$25 a month
- Quarterly Reports.....\$200 a quarter
- W2/W3.....\$20 each
- Year End Taxes.....Determined by what forms are needed
- Sales or excise Tax.....\$50 a month each
- Reconcile.....\$100 for first account \$20 for each additional
- Accounting Software.....\$65 a month
- Invoice.....\$2 each
- Deposits.....\$10 each plus .58 per mile
- Run Errands.....\$10 each plus .58 per mile

- Set Up Budget.....\$150
- Monthly Budget Change.....\$50
- Hourly Rate.....\$150
- Workman Comp Audits.....\$50
- Remote Office Visits.....\$100 per hour plus .58 per mile
- Office Meetings.....\$150 per hour
- SUTA Set up.....\$50
- EFTPS Set up..... \$50
- Sales & Excise Tax Set up.....\$50
- Set up Business w/ State.....\$100
- Set up EIN.....\$50
- Set up QuickBooks.....\$150
- Annual Reports.....\$50
- Monthly Reports.....\$50
- Teach QuickBooks.....\$300 per hour

By Signing this it acts as an engagement letter

Sign \_\_\_\_\_

Date \_\_\_\_\_