date:

first name:

last name:

business name:

your position:

address:

city:

state:

zip code:

phone:

email:

website:

type of business:

\_\_\_\_ retail \_\_\_\_ wholesale

\_\_\_\_ manufacturing \_\_\_\_ consulting

\_\_\_\_ coaching \_\_\_\_ other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_ service

business structure:

\_\_\_\_ sole proprietorship \_\_\_\_ partnership

\_\_\_\_ limited liability company \_\_\_\_ not-for-profit

\_\_\_\_ corporation

how long have you been in business?

\_\_\_\_ 0-1 year \_\_\_\_ 1-2 years

\_\_\_\_ 2-3 years \_\_\_\_ 3-4 years

\_\_\_\_ 5+ years

Take as much space as you need to answer the following questions.

How are you currently doing your bookkeeping and accounting?

Describe your business as it is right now.

Tell me about your current team. Do you get support from any of the following?

\_\_\_\_\_ Virtual Assistant – Administrative

\_\_\_\_\_ Virtual Assitant – Technical

\_\_\_\_\_ Certified Public Accountant (CPA)

\_\_\_\_\_ Enrolled Agent (EA)

\_\_\_\_\_ in-house staff, please describe:

If money and circumstances were not an issue, what would you be doing in your business?

What is your long-term vision for your company?

What is challenging you in your business right now?

What keeps you up at night?

Are you using Mac or PC ?

If you know (no worries if you don’t) I would love to know your:

Enneagram number (I’m a nine):

Birth order (I’m an only child):

Kolbe A assessment (I’m long on the ‘Fact Finder’):

Myers-Briggs: INFJ

Thanks so much!

Email this back to me at: [monique@equitybydesign.com](mailto:monique@equitybydesign.com).

Then schedule your complimentary, 60-minute [“Financial Clarity” call](https://www.timetrade.com/book/2DZSJ).