

***Financial reports are critical for the growth of any business, regardless of its size or industry. Financial reports provide valuable insights into a company's financial health and performance, which can be used to identify opportunities for growth and make strategic decisions.***

I want to know your why, and how to best build your business to support your mission and goals. And we want to guide business owners who want hands on assistance to vision and map their business starting with the foundational numbers to determine next steps.

I use an application process to make the most efficient use of time and energy for both parties, which is two steps:

**Step 1: Application (below)**
To ensure that we are a good fit for each other, I request that you complete the application below. Not sure which service is right for you? Not to worry! We'll make a recommendation based on where you're at in your business. We estimate this part of the process to take 10-15 minutes.

**Step 2: Discovery Call**
Once I’ve reviewed and determined which service can best meet your needs, you will receive an email with a link to schedule time to review your application and get better acquainted with each other.

***I am proud of you for reaching out to an expert as your grow your business. I can't wait to get started!***

**Investing in our services**

Regardless of what phase of business you are in, ATAC has a service just for you!

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Please select the service(s) you're interested in below.  \*

CFO Services - starting at $4,000/month

Beyond Bookkeeping - starting at $2,500/month

Executive Tax Prep - starting at $6,000/year

Availability for Discovery Calls is limited, and I only have space for a small number of new clients to come onboard each month. In order to hold space for clients who are ready to work with us, we want to ensure that this is best fit for the next step in working together.

**By selecting the service(s) above, you are confirming that you understand the pricing and are prepared to make a commitment to that investment. Discovery Calls are intended for serious inquiries only, to answer any final questions you may have before signing on for service.**

If you're not ready to work with us, that's okay! We highly recommend checking out the directory at [Accountants of Color](https://www.accountantsofcolor.co/directory), where you can browse a list of other BIPOC accountants to reach out to.

**Tell us a little bit about you.**

First Name:\*

Last Name:\*

Pronouns:

Email:\*

Phone Number:\*

Company Name\*

Website\*

What is your business entity type?  \*SelectSole ProprietorLLC - Single MemberS-Corp (includes LLCs and Partnerships taxed as an S-Corp)Corporation

I am the sole owner of my business.  \*

**Please note that I do not service the following:**

**- Businesses with more than 2 owners**

**- Non-profit entities**

**- Individuals without business or self-employment income**

**- Retail businesses or those with inventory as a primary income stream**

**- Trusts**

**- Estates**

**If this is you, we recommend that you check out the**[**directory at Accountants of Color**](https://www.accountantsofcolor.co/directory)**, where you can browse a list of BIPOC accountants to reach out to who can better serve you!**

How did you hear about us?\* SelectReferralGoogle/InstagramFacebookHeard on interview / NewsletterI am a current or prior client Other

If someone referred you, please let us know who so that we can thank them!

**Are we a good fit?**

**To ensure that clients can benefit from my specific areas of expertise, I have custom-built my services to complement small businesses that have certain things in common.** Below are a few questions to help us determine whether your business could be a good fit for my offerings.

We find our best clients have some things in common (please check the ones that apply to you):  \*

Earns revenue in the professional services industry (including but not limited to: coaches, consultants, lawyers, accountants, therapists, medical providers)

No inventory / not a retail business

Have a US-based business (you live in the US)

Are using QuickBooks Online (QBO) or ready to make the switch

Are up to date with bookkeeping and taxes

Have a project management system or specific set of processes for invoicing and getting paid

Value my counsel as your financial accountability partner

Are committed to open communication with me and comfortable meeting virtually and corresponding electronically?

**Please note: These are not necessarily dealbreakers, but in most cases we prefer all of the qualifiers above to apply before we take on a new client.**

Tell us a bit about your business.  \*

Do you have multiple businesses?  \*

Yes

No

If yes, how many?

How many years have you been in business?\*

What is your company's annual revenue?  \*SelectUnder $100,000$100,000 - $250,000$250,000 - $500,000$500,000 - $1,000,000$1,000,000 - $3,000,000$3,000,000 +

**How can we help you?**

What are your biggest pain points when it comes to your business finances?\*

What effects are these challenges having on your business and/or life?\*

What has prevented you from resolving the pain points you outlined?\*

How do you hope that working with an accounting firm will alleviate these challenges?\*

What is your ultimate goal when it comes to your business finances?\*

Do you currently have a bookkeeper and/or accountant?

Yes

No

What is your current accounting system? (Please note that all of ATAC services require QuickBooks or the willingness to move to the platform)  \*SelectQuickBooksFreshBooksWaveXeroSpreadsheetOther

How up-to-date are your books?  \*

My bookkeeping is up-to-date as of the last month

My accounting system needs minor cleanup

My books are two or more months behind (meaning transactions are uncategorized or inaccurately categorized, etc.)

How satisfied are you with your current accounting and reporting?

Very satisfied - things are done accurately and on time, and the level of reporting is suitable for my needs

Moderately satisfied - some room for improvement

Not satisfied - I'm looking for a total change

If your books need major help, how so?

***Any accounting changes needed to correct transactions that occurred prior to the service start date will be assessed during the initial assessment, and a separate estimate to have ATAC performing the necessary changes will be provided if applicable.***

Do you currently have employees (including yourself) for which you run payroll?

Yes

No

Do you have other software that integrates with your accounting system or provide data that informs the system?

Yes

No

If so, which one(s)?

Customer Management System (i.e. Dubsado, 17Hats, Honeybook, etc)

Bill Payment System (i.e. Bill.com)

Payment Processors (i.e. Stripe, Paypal, Square)

Online Shopping Systems (i.e. Shopify)

Payroll Service (i.e. Gusto, ADP, OnPay)

Other

Please specify below

What is the last year taxes were filed?\*

**For Sole Proprietors and Single-Member LLCs Only**

Filing Status SelectSingleMarried Filing JointlyMarried Filing SeparatelyHead of HouseholdWidowerUnsure

Do you and/or your spouse receive a W-2 income in addition to freelance, 1099, or self-employment income?

Yes

No

Does your spouse work as a freelancer or small business owner?

Yes

No

Do you own and/or operate any rental properties?

Yes

No