



Client Information Sheet
Bonus Books

ABOUT YOU:

Name _____

Address _____

Work Phone _____ Cell Phone _____

Home Phone _____ E-Mail _____

Best time of day to reach you _____

How did you hear about CFO2GO? _____

ABOUT YOUR BUSINESS:

In what industry do you work? _____

Name of employer (if applicable) _____

Do you have a separate bank account for this business? yes no

What is your estimated # of sales transactions per month? _____

Would you like to receive a list of your customers on a regular basis? yes no

How do you currently keep track of your sales and expenses? _____

ABOUT YOUR TAXES:

Did you file a tax return during 2003 for the 2002 tax year? yes no

Who prepared your return? _____

Do you have a vehicle that you use for business use? yes no

Do you receive a 1099-Misc form to report your wages? yes no

Do you make quarterly estimated tax payments? yes no

Fax completed form to 623 / 847 - 7775