Plumb

New Client Questionnaire

Please complete the following information to the best of your knowledge to assist us in preparing a proposal of services. The information provided should just entail the assets and transactions that would be tracked by Plumb if engaged.

1. Number of POA bank accounts (checking and savings): ___________________
2. Number of non POA bank accounts (checking and savings): _______________
3. Number of credit cards: ____
4. Number of credit card transactions on monthly basis: _____________________
5. Online capability for all bank and credit card accounts: ____________________
6. Number of bills paid on a monthly basis: _________________________________
7. Number of wires sent on a monthly basis: ________________________________
8. Number of entities to track (i.e. LLCs, Trusts): ___________________________
9. Frequency of cashflow reporting: ______________________________________
10. Number of homes (primary/secondary): _________________________________
11. Number of rental/commercial properties (US and International): ____________
12. Number of mortgages to track: ____
13. Number of household employees: ______________________________________
14. Use of outsourced payroll service: ______________________________________
15. Need for Online Document Sharing site: _________________________________
16. Need for QuickBooks access (# of users): ______________________________
17. Current accounting software in place (i.e. Quickbooks)?: __________________
18. Number of QuickBooks files in place/to set up: ___________________________

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