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 TAG if engaged.

1. Number of bank accounts (checking and savings): ____________________
2. Number of credit cards: ____
3. Online capability for all bank and credit card accounts: ___Yes | No_______
4. Number of brokerage/investment accounts: __________________________
5. Number of hedge and private equity funds: __________________________
6. Number of bills paid on a monthly basis: _____________________________
7. Number of credit card transactions on monthly basis: __________________
8. Number of entities to track (i.e. LLCs, Trusts): ________________________
9. Preparation of monthly or quarterly financial statements: ___Yes | No______
10. Number of homes (US and International): ____________________________
11. Number of rental properties (US and International): ___________________
12. Number of mortgages to track: ____________________________________
13. Number of household employees: __________________________________
14. Use of outsourced payroll service?: ____Yes | No______________________
15. Number of international accounts: __________________________________
16. Need for Online Document Sharing site?: _____Yes | No_______________
17. Current accounting software in place (i.e. Quickbooks, Quicken)?: _______