

Complimentary Consultation
BROOKS FINANCIAL ASSOCIATES
www.brooksfa.com
(510) 508-7874

Name & Title: _____ Date: _____

Organization: _____

Organization's address: _____

Type of business: _____

Legal form of business: _____

Phone number: _____ Fax number: _____

Email: _____ Website: _____

Initial contact with BFA made from: _____

1. How long have you been in business? _____

2. What motivated you to start your business?

3. What do you value most about the way you do business?

4. Describe your business model, including revenue cycle? How do you generate business?

5. What were your most recent annual gross revenues? _____

For which period? _____

6. What are your plans for growth & expansion?

7. What type of financial services do you think you could benefit from?

8. What is/was your greatest accounting/financial challenge?

9. What solutions have you implemented as a result?

10. What are your expectations of an accounting/financial professional?
