

# MORRIS + D'ANGELO

Not Just Another C.P.A. Firm

## PROSPECTIVE CLIENT QUESTIONNAIRE

### BACKGROUND – Personal Information

Full Name:		Date of Birth:	
Birthplace:		SS#:	
Street Address:			
City:		State:	Zip Code:
Home Phone:		Fax:	
Work Phone:		Pager:	
Cellular Phone:		Email:	
Employer:			
Title:		Length of Employment:	
Important Fringe Benefits			
How long have you lived in the Bay Area?			
Where were you raised?			
What College did you attend?			
College Location:		Major(s):	
Degrees Granted:			
Professional Affiliations:			
Volunteer Activities:			
Charities Supported:			
Preferred Hobbies:			

# MORRIS + D'ANGELO

Not Just Another C.P.A. Firm

## PROSPECTIVE CLIENT QUESTIONNAIRE

### BACKGROUND – Spouse/Partner/Family Information

Spouse/Partner Full Name:	Date of Birth:
Spouse Birthplace:	SS#
Spouse Employer:	
Title:	Length of Employment:
Important Fringe Benefits	
Child(ren) Full Name(s) / <i>please list below</i>	Child's Age/DOB

# MORRIS + D'ANGELO

Not Just Another C.P.A. Firm

## PROSPECTIVE CLIENT QUESTIONNAIRE

### BACKGROUND – Finances

Primary Bank:		Time with Bank:
Type(s) of Account(s):		
Current Financial Advisor(s) Name:	Type of Relationship:	Level of Satisfaction
Current Fee Relationship(s) with Advisor(s):		
Do you think the fee(s) charged were fair?		
If not, why not?		
Have you informed your previous accountant/advisor that you are meeting with us?		
Do you have an outstanding balance with your previous accountant/advisor?		
Do you Invest?		
What types of investments do you have/make?		
How would you rate your level of risk with your investments?		
Do you have an established Estate Plan?		
Do you have a Trust?		
Is your Will current?		
Who is your Attorney?		

# MORRIS + D'ANGELO

Not Just Another C.P.A. Firm

## PROSPECTIVE CLIENT QUESTIONNAIRE

### SERVICE RELATED QUESTIONS

How did you learn of MORRIS + D'ANGELO?	
Why did you initiate this contact?	
Please list your most important service issues:	
What are your expectations from a CPA/advisor?	
Please state how you would define a "successful" relationship:	
What is your annual advisor budget?	
How often would you like to meet with your accountant/advisor?	
Do you expect your accountant/advisor to contact you unilaterally throughout the year?	
On a scale of 1 to 10, with 1 being absolutely risk adverse and 10 being high risk taking, rate your risk comfort level relative to tax avoidance options:	
How quickly do you expect a "returned" telephone call?	
What is your expected turn around time for preparation of reports received by this office?	
How do you feel about filing for tax extensions?	
Would you like to receive email-based tax and financial related information?	
Do you have internet access?	How often do you access the internet?
How do you feel about being contacted by a firm member other than you initial partner contact?	
Please list any other service related or other items that you feel strongly about that we have not covered in this survey?	