



Client Self Assessment Form

- Describe your business in terms of products, services, targeted market size of operation, etc.
- How do you stand out from your competitors?
- What are three short term goals that you hope to accomplish this year?
- How do you plan to achieve those goals? Would it help if you had a partner to help with accounting or organization?
- What are your sales goals for the next year? 3 Years? 5 Years?
- What do you hate to do?
- What percent of your time do you spend on accounting tasks? Describe some of those tasks.
- Do you currently have accounting support? If no, why not?
- What percent of your time do you spend on growing your business?
- Do you feel that you are effectively operating your business? Why? Why not?
- What do you foresee as being the biggest financial hurdle in the next year?
- Do you feel you are effectively managing your time or do you wind up not accomplishing your goals because of accounting issues?

