

New Client Checklist

How to use this form:

Try using this handy New Client details form in your initial meeting with your new client to establish their needs. Select the features your new client needs. Then cross check to the four columns in the middle to decide which subscription is best for their business needs. The ✓ shows what is included in each subscription.

New Client Details

Name of Company:

Legal Name:

Contact Name:

Phone Number:

Website:

Email:

Address: Street, City

Address: State, Zip

Industry:

Entity:

EIN:

Keeping Service New Client Checklist

LP Steffe



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