



The Paolillo Financial Planning Group

Jonathan Paolillo and Len Paolillo, CPA
Business Advisors and Strategic Sales Consultants

A Division of Milkcase Gang Productions, LLC

www.PFPGroupUSA.com

www.MilkcaseGang.com

Telephone: 1-781-489-3384

Chester B. Gopher

INITIAL CONSULTATION CHECKLIST

Company Overview/Organization

Legal Name and Address of Entity _____

Company History _____

Tax ID # (Optional) _____

Company has Tax ID # Yes No

To Apply Yes No

Business Type (Select One): Sole Proprietorship, Limited Partnership, Corporation,
S Corporation, Limited Liability Corporation or Limited Liability Partnership

City/Town Registration (If applicable) _____

Percentage of Ownership _____

Names with Percentage _____

Website Address _____

Email Address _____

Number of Employees: _____

Part-Time _____

Full-Time _____

180 Linden Street - Suite 8D Wellesley MA 02482 Info@PFPGroupUSA.com

Dig Out The Facts - Hire An Accountant™

The Paolillo Financial Planning Group
Business Advisors and Strategic Sales Consultants

Most Recent Year:

Annual Sales	
Annual Gross Profit	
Annual Net Income	

Insurance – Business:

Liability (Umbrella)	Yes	No
Product Liability	Yes	No
Workers Compensation	Yes	No
Health & Disability	Yes	No

Licenses – Business:

Federal	Yes	No
State	Yes	No
Local	Yes	No

Type of Registrations:

Trademarks	Yes	No
Copyrights	Yes	No
Patents	Yes	No

Demographics of your company:

Type of customer	Wholesale	Retail	Both
Majority of customers from	Local Businesses	Residential	

Management

Advisors	Yes	No
Attorney	Yes	No
CPA	Yes	No
Business Advisor/Consultant	Yes	No
Investment Advisor	Yes	No

Operations

Production performed in house	Yes	No
Services performed in house	Yes	No
Outsourcing	Yes	No
Describe		

Property Own/Rent	Lease	Own
-------------------	-------	-----

The Paolillo Financial Planning Group
Business Advisors and Strategic Sales Consultants

Products/Services

Nutrition Labels	Yes	No
Pricing Method/Strategy	_____	

Marketing

Internal Marketing	Yes	No
External Marketing Company	Yes	No
Advertise	Yes	No

Financial

Credit Cards Accepted	Yes	No
Credit Card Fees	_____	
Credit Card Service Provider	_____	

Type of Business Bank Accounts:

Savings	Yes	No
Checking	Yes	No
Money Market	Yes	No
CD	Yes	No

Credit Terms for Customers	Yes	No
Describe Terms	_____	

Credit Terms from Suppliers	Yes	No
Average Terms	_____	

Capital Requirements	_____	
----------------------	-------	--

Company Information:

Briefly describe your pricing, manpower, competition, products and services.

The Paolillo Financial Planning Group
Business Advisors and Strategic Sales Consultants

Expansion

Do you have plans to expand and if so, what type of goals do you currently have?

Other



Copyright 2009/2010 The Paolillo Financial Planning Group
Milky & the Milkcase Gang! and Chester B. Gopher are Trademarks of Milkcase Gang Productions, LLC

180 Linden Street - Suite 8D Wellesley MA 02482 Info@PFPGroupUSA.com
Dig Out The Facts - Hire An Accountant TM