



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

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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
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Products/Services

Nutrition Labels	Yes	No
Pricing Method/Strategy	<hr/>	
<hr/>		

Marketing

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

Financial

Credit Cards Accepted	Yes	No
Credit Card Fees	<hr/>	
Credit Card Service Provider	<hr/>	

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	<hr/>	

Credit Terms from Suppliers	Yes	No
Average Terms	<hr/>	

Capital Requirements	<hr/>	
<hr/>		

Company Information:

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

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Expansion

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

Other



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