



Let's find out what you need.

A few quick questions before our consultation, so we make the most of our time together.

1. Contact & Business Details

Full Name / Business Name

Contact Number

Email Address

Physical / Trading Address

How did you hear about us?

2. Business Structure

What type of entity are you?

☐ Sole Proprietor

☐ Partnership

☐ Private Company (Pty Ltd)

☐ Public Company (Ltd)

☐ Non-Profit Company (NPC)

☐ Close Corporation (CC)

☐ Personal Liability Company (Inc)

☐ Trust

☐ Not yet registered

When was the business established, or when do you plan to start? Estimated annual turnover



3. Current Financial Management

Do you currently have a bookkeeper or accountant? If switching, who and why?

What software do you currently use, if any? (Sage, Xero, spreadsheets, none, etc.)

Are your books up to date, or is there a backlog?

☐ Up to date

☐ Some backlog

☐ Significant backlog

Are you currently registered for VAT?

If yes, VAT number

☐ Yes

☐ No

Do you have SARS eFiling access already set up?

☐ Yes

☐ No

☐ Not sure

Any outstanding SARS submissions, penalties, or verifications you're aware of?

4. Team & Volume

How many employees do you currently have (if any)?

Monthly transactions (approx.)

Do you anticipate growth in headcount or transaction volume in the next 12 months?



5. Services You're Interested In

Select all that apply:

- ☐ Bookkeeping (data entry, trial balance)
- ☐ Payroll (SimplePay, EMP201/EMP501, UIF, IRP5s)
- ☐ VAT (registration, calculations, submissions)
- ☐ Taxation (ITR12, ITR14, provisional tax)
- ☐ Company Secretarial (CIPC registration, annual returns)
- ☐ Financial Statements (annual, with policies & notes)
- ☐ Not sure yet - would like guidance

6. Goals & Pain Points

What's the main reason you're seeking help right now?

What would a successful outcome from this consultation look like for you?

7. Consultation Logistics

Preferred contact method:

- ☐ Phone ☐ WhatsApp ☐ Email

Best days / times for a call or meeting?

How to return this form

Save this completed PDF and email it to quintin@dupreezbookkeeping.co.za, or WhatsApp it to 082 573 0697.

We'll review it before our consultation so we can make the most of our time together.