



Request Demo/More Information

PLEASE CONTACT ME. I AM INTERESTED IN THE FOLLOWING...

- ☐ Complete package – accounting and bookkeeping, financial reports, dashboard, benchmarking
- ☐ À la carte
 - ☐ Accounting and bookkeeping services
 - ☐ Monthly review of financial statements, cash flow planning, budgets, review of internal operating efficiencies and other CFO services
 - ☐ Dashboard – measuring key performance indicators
 - ☐ Benchmarking – comparing performance against other facilities and industry standards

Name: _____

Title: _____

Facility Name: _____

Facility Address: _____

Contact Phone: _____

Contact Email ID: _____

What POS system do you currently use? _____

How long has your business been in operation?

- ☐ Still in the planning stages
- ☐ Less than 6 months
- ☐ 6 Months - 2 Years

- ☐ 2 - 5 Years
- ☐ 5+ Years
- ☐ 10+ Years

How does your business currently handle accounting and bookkeeping?

- ☐ Dedicated staff
- ☐ Specialized online / offline software
- ☐ Owner manages bookkeeping / accounting

- ☐ In-house paper records
- ☐ Outsource to an external firm
- ☐ We currently do not keep the records / we're a startup

How many in-house employees currently manage your accounting and bookkeeping?

- ☐ Less than 5
- ☐ 21 to 50
- ☐ 5 to 10
- ☐ 51 to 100
- ☐ 11 to 20
- ☐ More than 100

