

# GrowthLab General Ledger Review

\* Indicates required question

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1. Email \*

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2. Company Name \*

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3. Lead Name \*

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4. Account #1 \*

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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## 5. Financial Accounts (Bank Accounts, Credit Cards, Loans) \*

*Check all that apply.*

<20	20-100	>100	
TRX	TRX	TRX	
<b>Account #1</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## 6. Account #2

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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## 7. Financial Accounts (Bank Accounts, Credit Cards, Loans)

*Check all that apply.*

<20	20-100	>100	
TRX	TRX	TRX	
<b>Account #2</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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**8. Account #3**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**9. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #3</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**10. Account #4**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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## 11. Financial Accounts (Bank Accounts, Credit Cards, Loans)

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #4</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## 12. Account #5

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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## 13. Financial Accounts (Bank Accounts, Credit Cards, Loans)

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #5</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**14. Account #6**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**15. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #6</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**16. Account #7**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**17. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#7</b>			

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**18. Account #8**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**19. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#8</b>			

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**20. Account #9**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**21. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #9</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**22. Account #10**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**23. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#10</b>			

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**24. Account #11**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**25. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#11</b>			

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**26. Account #12**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**27. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account #12</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**28. Account #13**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**29. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#13</b>			

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**30. Account #14**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**31. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#14</b>			

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**32. Account #15**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**33. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #15</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**34. Account #16**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**35. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#16</b>			

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**36. Account #17**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**37. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#17</b>			

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**38. Account #18**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**39. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

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<b>Account #18</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**40. Account #19**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**41. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#19</b>			

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**42. Account #20**

Financial Accounts (Bank Accounts, Credit Cards, Loans) - **NAME OF INSTITUTION & TYPE OF ACCOUNT**

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**43. Financial Accounts (Bank Accounts, Credit Cards, Loans)**

*Check all that apply.*

<20	20-100	>100
TRX	TRX	TRX

---

<b>Account</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>#20</b>			

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**44. eCommerce***Check all that apply.*

	1 account	2 accounts	3 accounts	4 accounts	5 accounts
<b>Amazon</b>	<input type="checkbox"/>				
<b>Shopify</b>	<input type="checkbox"/>				
<b>Square</b>	<input type="checkbox"/>				
<b>Etsy</b>	<input type="checkbox"/>				
<b>Ebay</b>	<input type="checkbox"/>				
<b>WooCommerce</b>	<input type="checkbox"/>				
<b>Other</b>	<input type="checkbox"/>				

**45. Revenue COA Allocations (2 Included) \****Mark only one oval.* 1-2 3-5 >5 (=custom pricing)

## 46. List the customer's COA Revenue Categories \*

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## 47. # of Active Classes \*



*Mark only one oval.*

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

48. Is Catchup Bookkeeping required? \*

*Mark only one oval.*

Yes

No

49. What is the Catchup Bookkeeping date range?

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50. Additional Notes:

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