

| Client Name: |
|---|
| Business Name: |
| Business Owner(s): |
| Business Industry: |
| Cell Phone: |
| Phone: |
| Email: |
| How long have you been in the business? |
| Number of employees:: |
| Number of independent contractors: |

Goals

What are you hoping to achieve with this business overall? (In your industry, practice, society.)

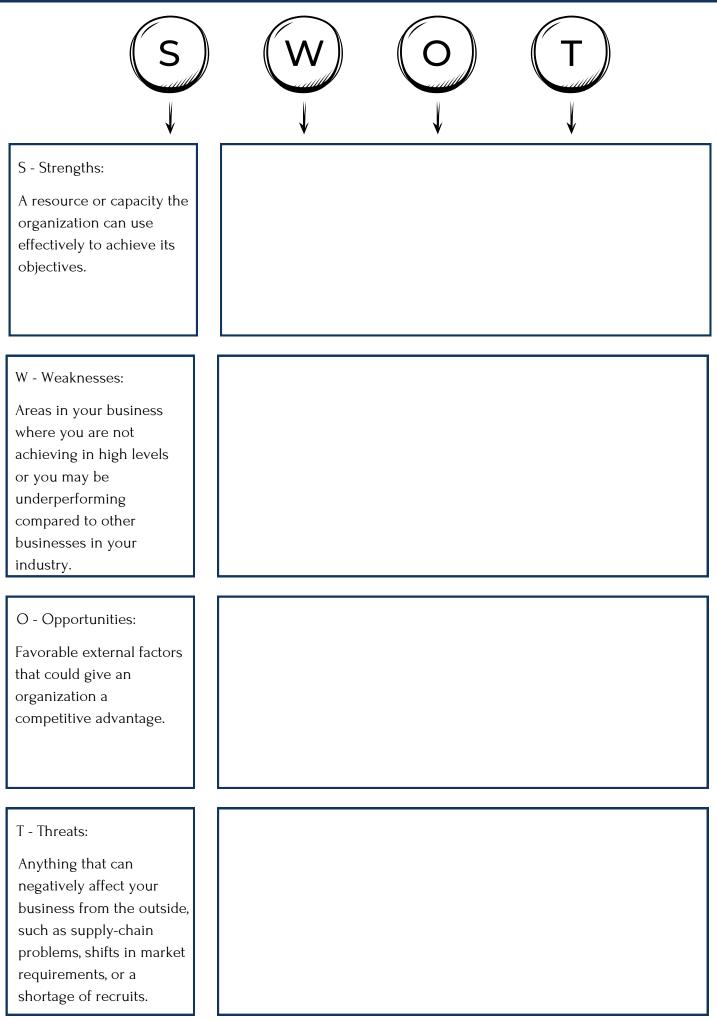
What do you intend for this business to do for you personally?

What are some things you intend to learn from this?

What resources/instructions do you need to make it to the next level?

What are your expectations from Trydent?







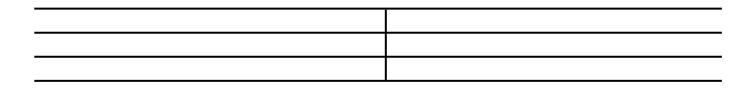
TRYDENT ASSISTANCE

What has your average revenue been for the past 3 years? (estimate)

What is your current accounting system?

What would you like to improve or keep the same about your current accounting process? (Pros & Cons list)

<u>PROS</u>



<u>CONS</u>

What information are you comfortable with providing to help Trydent assist with accounting? (Login credentials, copies of statements)

Are you comfortable with providing your last two tax returns?



What areas do you need assistance in the most? (Check all that apply)

Bookkeeping
Business Planning
Tax Preparation
Branding
Financial Stewardship
Training

INTRODUCTION

Mission Statement (brief)

Vision (brief)

BRANDING

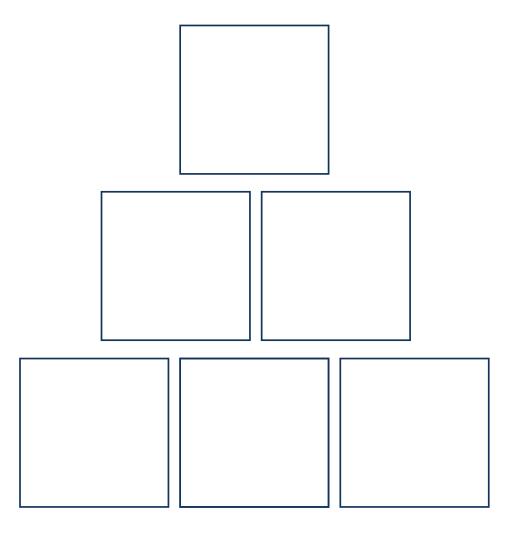
What is your story?

What motivated you to start this business?

What is the tone you want to convey? (E.g. nurturing, helpful, uber professional, fun, witty)

What makes you stand out from other businesses/companies in your industry?

What are the values of your business? (list of adjectives) *exercise*



KNOWING YOUR AUDIENCE

Who is your "tribe"? (Target audience)

Why should they buy from you/need this product or service you're providing?