



**EDWARDS
& ASSOCIATES**
RT Edwards & Associates PC
CERTIFIED PUBLIC ACCOUNTANTS

17060 Dallas Parkway, Suite 200
Dallas, Texas 75248
(972) 267-9191

Personal Information

Client

Name:

DOB: ___/___/___

Home Address:

Home Phone:

Home Fax:

Mobile:

E-mail:

Spouse

Name:

Occupation:

DOB: ___/___/___

Mobile: _____

Email: _____

Children

Name:

DOB ___/___/___

Name:

DOB ___/___/___

Name:

DOB ___/___/___

Name:

DOB ___/___/___

Tax Information

Have you had your 2007 Taxes
Prepared? **Yes** **No**

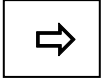
If not, would you like for us to prepare
them? **Yes** **No**

How did you hear about our firm?

Education

Year Graduated? _____

Where did you go to Dental School?



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**Practice Information
Start-Up Questionnaire**

Time Line for Opening:

- PC (or other appropriate entity) set up?

Have you secured?

- Financing? If so, name of lender? _____
- Location? If so, address or area? _____

- Existing?
- New Building?

- Contractors / Finish Out?
- Attorney for contract reviews?
- Payroll Company?
- Tenant representative for leasing?
- Banking relationship?
- Equipment sales specialist?
If so, whom? _____



As a Dental Specializing CPA firm, we can assist with all of the above. You may be able to benefit from our detailed knowledge of the medical profession. Once your practice is open, we can then begin to assist in your operation of the practice. We provide many services, including:

- ☞ Financials
- ☞ Tax Planning
- ☞ Financial Planning
- ☞ Investments
- ☞ Quarterly and Annual Reports and Filings (i.e.: 941 and Business Personal Property)
- ☞ Tax Notices
- ☞ Practice Appraisals

Please let us know when you are ready to engage our firm. Our advisement fee is \$950.00 and includes:

- ☞ Advice during the set-up state of your practice regarding any and all business issues that arise through the date of practice opening.
- ☞ Review of loan proposals submitted to client for consideration in providing the start-up financing for the new medical practice for acquisition of equipment, tenant finish-out, working capital, etc.
- ☞ Negotiating with potential lenders as considered necessary, in order to obtain financing on favorable terms for the client taking into account the various federal income tax considerations in effect at the time.

We are also able to assist you with preparation of your loan packages. The fee for this service is \$300.00 and includes:

- ☞ Preparation of personal financial statement, letter of intent, and all required supporting documentation as required by the lender to obtain financing.

Business Contact Information

Business Name:

Address:

Phone Number:

Direct Line: (if applicable)

Fax Number:

Office Manager Name: (if applicable)

E-mail Address:

Would you rather we contact you via phone or e-mail?
