



QB EXPRESS
QB SEMINAR SYSTEMS

527 Rivergate Parkway
Goodlettsville, TN 37072
Phone: 855-723-9773 Fax: 615-301-6547
www.qbexpress.com

Client On-Boarding Process and Procedures

Licensing agreement to purchase QBExpress Client On-Boarding Procedures created by Penny Breslin of MoneyPennyLLC.

Firm name: _____ Accountant: _____

Address: _____ City: _____ ST: ____ Zip _____

Phone: ____ - ____ - _____ Fax: ____ - ____ - _____ Email: _____

Your purchase includes the following checklists:

Initial Client Meeting, New Client Intake, New Client Evaluation, Needs Assessment, Insourcing-Outsourcing Agreements, Service Level for Specific Work, Service Level Agreement, Service Levels (i.e. Performance Standards and Remedies), Clean-up Tasking Activities, Client Specific Info and Procedures, Task Sequencing, File Naming, Naming Rules for Documents and List names, Chart of Accounts, APPS, Bank and Credit Card, Accounts Receivable, Accounts Payable, Payroll, Payroll Setup, Recording Daily Cash Receipts/Merchant Services, Inventory, 1040 Tax Return Checklist, etc.

Payment Options

Pricing: \$299.00

_____ Check

_____ Cash

_____ Credit Card

Credit Card Information:

Name on Card: _____

Billing Address: _____ City: _____ ST: ____

Zip: _____

Credit Card Number: _____

Exp. Date: _____ CSV: _____

Signed by Legal Representative of Firm Date