

## We're Not Your Ordinary Pencil Pushers

### Doing Business With Us

On behalf of the team at Raincoast, we thank you for your consideration in engaging our services. We have learned through past experience that both parties need to be in agreement to have a successful relationship. In order to evaluate the level and types of services you require, we have designed some relevant questionnaires to aid our analysis and determination as to your needs and wants; and to our mutual compatibility. Consider us your Financial Physician! Like your doctor, the more we know about you, the better we can serve you.

This is not a test, so there are no right or wrong answers. We are simply trying to determine if the unique make up of Raincoast and the goals we set to accomplish for our customers, is a match with your requirements. Not all prospective relationships fit the profile that enables us to provide the services required. This Questionnaire and subsequent initial interview are two of the tools we use to better determine the potential of a positive relationship. In as much as we are interviewing you as to your qualifications, we highly recommend that you interview us. Over the years, we have come to accept that although Raincoast's approach to accounting, tax and advisory services is unique, we are not the best solution for all prospects. Long-term value is only maximized when the customers' wants, needs, personality, and financial condition synergistically connects with ours.

We do not price our series by the hour. We believe that the true value is determined by each party. No two relationships are equivalent, and accordingly no two engagements will have the same price and terms. Accordingly, comparison between your needs and wants with those of your acquaintances generally does not produce valid information. And in as much as your relationship is confidential between you and Raincoast, we cannot discuss the terms and conditions of your friends and acquaintances that may happen to have relationships with Raincoast also.

We generally require a retainer to be applied to the financial agreement between our firm and our customers. However, since we provide a complete service satisfaction guarantee, we will gladly refund your prepayment should you unilaterally determine that we have not provided the services agreed to in our service agreement.

In conclusion, we invite you to complete the questionnaire. If you have an interview scheduled, please submit the questionnaire at a minimum of 3 days prior to the interview date. If you do not have an interview scheduled, we will contact you within 3 days of receiving your questionnaire.

Please know that any information disclosed to our office is confidential. If you have any questions, please feel free to contact us any time. We look forward to meeting you personally very soon.

## PROSPECTIVE BUSINESS CLIENT QUESTIONNAIRE

### Personal Data:

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Other Information: \_\_\_\_\_

### Business Data:

Business Name: \_\_\_\_\_ Type of Business: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Name of Bank and Primary Banking Officer: \_\_\_\_\_

Name of Law Firm and Primary Legal Counsel: \_\_\_\_\_

How Long Have You Been in Business?: \_\_\_\_\_

Do You Have an Active Board of Directors?: \_\_\_\_\_ And, If So, How Many are "Outside Directors"? \_\_\_\_\_

Are You Profitable? \_\_\_\_\_ Website Address: \_\_\_\_\_

If Not, How Do You Plan on Covering Operations and Cash Flow?

### Service Related Questions:

Why are you contacting Raincoast?

What do you expect of your Accountant?

What is your current "pain" i.e. business problem(s)?

Do you have a current accountant/firm? \_\_\_\_\_

**Service Related Questions, continued:**

What DON'T you like about dealing with your current accountant/firm?

What DO you like about dealing with your current accountant/firm?

Please rate your Company's strength in the following areas, using a 5 point scale with 1 = poor and 5 = superior:

- |                                     |  |
|-------------------------------------|--|
| ___ Overall Vision/Mission/Strategy | ___ Leadership                           |
| ___ Finance/Cash Flow/Banking       | ___ Inter-departmental Cooperation       |
| ___ Sales & Marketing               | ___ Succession Planning or Exit Strategy |
| ___ Administration                  |  |

Who are your most influential advisors and how frequently do you contact them for advice?

Do you feel you are effectively managing your business?

What are the key performance indicators or ratios that you monitor for your business?

What keeps you awake at night about your business?

What are the three most important current issues impacting your Company's performance?

What are the three most important future issues that will impact your Company's performance?

Are you paying the appropriate amount of income taxes on your profits?

Do you know what income tax planning has been done for you and your business?

Do you know the approximate value of your business? And, Do you base this on what you would accept to sell your business? Or on how a prospective buyer would value your business?

Do you have an Exit Strategy? And is this based on a retirement plan, or a planned change of direction?

Have you considered an Exit Strategy for unplanned, unforeseen events?

How many weeks vacation do you take per year? And how many days during those vacations did you have some form of communication with your business?

If price weren't an issue, what role would you want Raincoast to play in your business?

What evidence will you need to see in six months to determine whether you have made the right decision to hire us?

What is your annual advisor budget?

How Did Your Learn of Raincoast?