

Not For Profit Questionnaire

DATE:	REFERRED BY:	TIME:
-------	--------------	-------

Organization Information

CONTACT PERSON'S NAME:		
ORGANIZATION NAME:		
HOME PHONE NO:	OFFICE PHONE NO:	E-MAIL ADDRESS:
CELL PHONE NO:	FAX NO:	WEB SITE ADDRESS:

Address

ORGANIZATIONS LOCATION:	COUNTY:
MAILING ADDRESS, IF DIFFERENT:	COUNTY:

Other Information

NPO DESCRIPTION:	Is organization a 501(c)(3)? Date of Incorporation & State of Incorporation:
AVERAGE NUMBER OF EMPLOYEES:	EMPLOYER IDENTIFICATION NUMBER:
NUMBER OF MINISTERS:	STATE CHARTER NO:
DOES THE ORGANIZATION FILE 941'S OR 944 PAYROLL REPORTS?	WITHHOLDING TAX IDENTIFICATION NO:
CURRENT METHOD OF PAYROLL SERVICES	STATE UNEMPLOYMENT IDENTIFICATION NO:

Directors and Officers

NAME	TITLE	Date Term Expires?	Volunteer or Salary	ADDRESS

PURPOSE OF VISIT TODAY:



Servicing all 50 states

Previous Accountant:
New Clients: Why are you not using your previous accountant again this year?
Method of payment for services:
Estimated Fees:

Signature:

Signature:

In the event that I decide not to use the services of National Church & Clergy, LLC, there will be a minimum charge of up to half the estimated fees. I have read the additional engagement letter on the back or as an attached form and agree to the terms.

NOTES:

Not For Profit Business Engagement Letter

We are pleased to provide you with professional services. This engagement letter embodies the entire agreement regarding the services to be rendered by our firm for you. This will confirm our understanding of the professional services to be rendered by our firm for you. We will perform (please check the appropriate box), based upon information you provide:

<input type="checkbox"/> Payroll Services	<input type="checkbox"/> Bookkeeping Services	<input type="checkbox"/> Income Tax Services	<input type="checkbox"/> Consulting Services	<input type="checkbox"/> IRS issues	<input type="checkbox"/> New Start up or Incorporating
---	---	--	--	-------------------------------------	--

Our engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. However, we will inform you of any material errors that come to our attention and any fraud or other illegal acts that come to our attention, unless they are clearly inconsequential. In addition, we have no responsibility to identify and communicate significant deficiencies or material weaknesses in your internal control as part of this engagement. Our liability for all claims, damages, and costs you incur related to this engagement is limited to the total amount of fees paid by you to us for services rendered under this agreement. You agree to hold us harmless from any and all claims which arise from knowing misrepresentations or the intentional withholding or concealment of information. You also agree to indemnify our firm for any claims made against our firm by third parties which may arise from any of these actions.

You will prepare and supply all supporting documentation required to the aforementioned procedures prior to the preparation of the documents. These records will remain your property and will be returned to you upon issuance of the reports and tax forms. It is your responsibility to maintain and preserve these records. Your records are provided to us only as needed to complete our engagement. Our records and files are our property and are not a substitute for their records. Our firm destroys our client files and all pertinent work papers after a retention period of 3 years, after which time these items will no longer be available. Catastrophic events or physical deterioration may result in our firm's records being unavailable.

We will provide services to you as you request them. You authorize us to accept instructions from yourself or your designee and we may rely upon the instructions we receive as being your instructions. Customer satisfaction is an important aspect of our service. If, during the course of the engagement, you would like to discuss our service with us or wish to change or expand the services we have agreed to perform, you agree to contact Leslie Wilson at this office, who is in charge of your engagement.

We will commence work for you when you provide us with the information. Efficient use of our staff benefits yourself and our firm, allowing for timely completion of our work. Delays in rendering services may occur if the necessary documents or information are missing.

You may request that we perform additional services not contemplated by this engagement letter. If this occurs, we will communicate with you regarding the scope and estimated cost of these additional services. Engagements for additional services may necessitate that we issue a separate engagement letter to reflect the obligations of both parties. In the absence of any other written communications from us documenting such additional services, our services will be governed by the terms of this engagement letter.

In the unlikely event that circumstances occur which we in our sole discretion believe could create a conflict with either the ethical standards of our firm or the ethical standards of our profession in continuing our engagement, we may suspend our services until a satisfactory resolution can be achieved, or we may resign from the engagement. We will notify you of such conflicts as soon as practicable, and will discuss with you any possible means of resolving them prior to suspending our services.

In the event that we receive a subpoena or summons requesting that we produce documents from this engagement or testify about the engagement, we will notify you prior to responding to it if we are legally permitted to do so. You may, within the time permitted for our firm to respond to any request, initiate such legal action as you deem appropriate to protect information from discovery. If you take no action within the time permitted for us to respond or if your action does not result in a judicial order protecting us from supplying requested information, we may construe your inaction or failure as consent to comply with the request.

Our fees for these services listed above will be billed at our standard hourly rate of \$100 per hour for each of our employees as well as reimbursement for out-of-pocket costs incurred in order to complete the engagement. Travel time will be billed at our standard rate as well. Specialized work like OIC, IRS issues, IRS letters, and Incorporating will be up to \$160 per hour. All returned checks will be resubmitted to your bank electronically for the face amount of the check. The return check service fee of \$25 will also be submitted to your bank electronically. We reserve the right to suspend or terminate our work in the event we do not receive timely payment of our billing statements. This suspension or termination of our work may cause you to fail to meet deadlines or may result in other adverse consequences and is a proper consequence of nonpayment of our statements. If we encounter situations that require us to devote substantially more time to the engagement than budgeted, or if staff with different qualifications are required, we may contact you in advance and provide to you a revised estimate of our professional fee. However, we may not notify of additional fees if they are reasonable in nature or if we are asked to perform additional services outside the original engagement. In most instances we will provide a monthly progress billing if the project requires more than 30 days to complete which we will then require a payment prior to the completed project. Most engagements will require a retainer fee to be paid at the time of the initial consultation of up to 1/2 the estimated fees.

We will bill you for our professional fees in agreement with the above paragraph, expenses and out-of-pocket costs progressively as we complete the engagement. Payment is due at the time services are rendered. We reserve the right to suspend or terminate our work in the event we do not receive timely payment of our billing statements. This suspension or termination of our work may cause you to fail to meet deadlines or may result in other adverse consequences and is a proper consequence of nonpayment of our statements.

Parties to this engagement agree that any dispute that may arise regarding the meaning, performance, or enforcement of this engagement will, prior to resorting to litigation, be submitted to mediation upon the written request of any party to the engagement. All mediations initiated as a result of this engagement shall be administered by the American Arbitration Association (AAA). The results of this mediation shall be binding only upon agreement of each party to be bound. Cost of any mediation proceeding shall be shared equally by both parties.

We appreciate the opportunity to be of service to you. Please date and sign the new business questionnaire to acknowledge your agreement with the terms of this engagement.

Privacy Policy

As a Professional firm, we will always protect your right to privacy. Like all providers of personal financial services, we are now required by law to inform our clients of our policies regarding privacy of client information.

* Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

* Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared. There may be video or audio recordings of private meetings that may be used in order for clarification of initial meetings or training purposes.

* Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Officer's Signature _____ Date _____