



# CLIENT INTAKE FORM

## COMPANY INFORMATION

Please complete the below section if the company has already been registered

Company Name	<input type="text"/>		
Address	<input type="text"/>		
Province	<input type="text"/>	Postal Code	<input type="text"/>
Phone Number	<input type="text"/>	E-Mail	<input type="text"/>
Registration nr	<input type="text"/>		
Type of Company	<input type="checkbox"/> Pty Ltd <input type="checkbox"/> CC <input type="checkbox"/> Sole Propriety <input type="checkbox"/> Other _____		

## PRIMARY CONTACT DETAILS

Owner Name	:	<input type="text"/>	Owner Surname	:	<input type="text"/>
Owner Tel nr	:	<input type="text"/>	Owner Email	:	<input type="text"/>
Contact Name	:	<input type="text"/>	Contact Surname	:	<input type="text"/>
Contact Tel nr	:	<input type="text"/>	Contact Email	:	<input type="text"/>

## ADDITIONAL INFORMATION

Type of Industry:   ☐ Services   ☐ Retail   ☐ Manufacturing   ☐ Other

Size of company   ☐ Very Small   ☐ Small   ☐ Medium

0-4 Employees   5-9 Employees   10-15 Employees  
< R500,000 Annual Turnover   < R2,000,000 Annual Turnover   < R5,000,000 Annual Turnover

Financials are up to date?   ☐ Yes   ☐ No

Complete the form and  
email to:  
[info@newdusk.co.za](mailto:info@newdusk.co.za)

THANK YOU



# CLIENT INTAKE FORM

## ONCE-OFF PACKAGES

Which, if any, of the packages would you like us to quote you on?

☐ Basic Package

### Company Registration

Pty Ltd Registration, with at least one Director.  
Income Tax Registration

### Company Income Tax Registration

Company Income tax registration

### Logo Design

3 Logo Concepts, 3 Revisions, Original Vector files, All relevant images.

### Website Design

Domain Registration (Only co.za) with 1-3 Page WordPress Website. Monthly hosting payable by the owner

☐ Enhanced Package

### Company Registration

Pty Ltd Registration, with at least one Director.  
Income Tax Registration

### Company Income Tax Registration

Company Income Tax and PAYE registration

### Logo Design

3 Logo Concepts, 3 Revisions, Original Vector files, All relevant images.

### Website Design

Domain Registration (ONLY co.za) with 1-3 Page WordPress Website Designed. Monthly hosting to be paid by the owner. Monthly hosting will be quoted separately and paid by the owner.

☐ Premium package

### Company Registration

Pty Ltd Registration, with at least one Director.  
Income Tax Registration

### Company Income Tax Registration

Company Income Tax, PAYE, and VAT registration.

### Logo Design

3 Logo Concepts, 3 Revisions, Original Vector files, All relevant images.

### Website Design

Domain Registration (ONLY co.za) with 1-3 Page WordPress Website Designed. Monthly hosting to be paid by the owner. Monthly hosting will be quoted separately and paid by the owner.

## MONTHLY PACKAGES

Which, if any, of the packages would you like us to quote you on?

☐ Basic Package

### Processing

Processing and reconciliation of all transactions and account

### Annual Financial Statements

Preparation of Annual Statements

### Tax Services

Income Tax Returns - Calculations and Submission

### Cloud based accounting

Cloud based accounting software. All documentation available online.

### Monthly Reporting

Monthly reporting will include: Executive summary, Cash summary, Profit & Loss, Balance Sheet, Aged Receivables, Aged Payable

### Marketing

Social Media - 4 Posts per month; 1 Platform, R500 monthly campaign.

☐ Enhanced Package

### Processing

Processing and reconciliation of all transactions and account

### Annual Financial Statements

Preparation of Annual Statements

### Tax Services

Income Tax Returns - Calculations and Submission. PAYE, UIF, and SDL - Calculations, Reconciliation, and Submission

### Cloud based accounting

Cloud based accounting software. All documentation available online.

### Monthly Reporting

Monthly reporting will include: Executive summary, Cash summary, Profit & Loss, Balance Sheet, Aged Receivables, Aged Payable

### Marketing

Social Media - 2 Posts per week; 2 Platform, R800 monthly campaign.

### Payroll

Payroll Processing and payslips printing. Less than 10 employees.

☐ Premium package

### Processing

Processing and reconciliation of all transactions and account

### Annual Financial Statements

Preparation of Annual Statements

### Tax Services

Income Tax Returns - Calculations and Submission. PAYE, UIF, and SDL - Calculations, Reconciliation, and Submission. VAT Returns - Calculations, Reconciliation, and Submission

### Cloud based accounting

Cloud based accounting software. All documentation available online.

### Monthly Reporting

Monthly reporting will include: Executive summary, Cash summary, Profit & Loss, Balance Sheet, Aged Receivables, Aged Payable

### Marketing

Social Media - 3 Posts per week month; 3 Platform, R1000 monthly campaign.

### Payroll

Payroll Processing and payslips printing. Less than 15 employees.

Complete the form and  
email to:  
[info@newdusk.co.za](mailto:info@newdusk.co.za)

THANK YOU



# CLIENT INTAKE FORM

## ADDITIONAL

If our packages is not what you are looking for - please select one or more of the following services, in order for us to provide you with an accurate quotation:

- |   |   |  |  |
|---|---|--|--|
| <input type="checkbox"/> Logo Design                | <input type="checkbox"/> Website Design               | <input type="checkbox"/> Label Design                    | <input type="checkbox"/> Business Registration |
| <input type="checkbox"/> Reconciliation             | <input type="checkbox"/> Data Analysis                | <input type="checkbox"/> Form Creation                   |  |
| <input type="checkbox"/> Payroll Services (monthly) | <input type="checkbox"/> Marketing services (monthly) | <input type="checkbox"/> Accounting Services (monthly)   |  |
| <input type="checkbox"/> Tax Services (monthly)     | <input type="checkbox"/> Annual Financial Statements  | <input type="checkbox"/> Distribution Services (monthly) |  |

## ADDITIONAL INFORMATION

Please complete the questions below, based on your requirements and services requested:

Briefly explain what you company does

Accounting Software you currently use:

Payroll Software you currently use:

Number of debit/check transaction you have monthly:

Do you currently have vendor(supplier) accounts: ☐ Yes ☐ No

Approximately how many invoices do you generate monthly.

Please select the ones that is appropriate to you: ☐ Tracking Inventory ☐ Charge VAT on invoices

Number of bank accounts:  Number of credit cards:

Have you worked with a consulting/bookkeeping/marketing agency before? If yes, provide details ☐ Yes ☐ No

What social media accounts do you have in place:

☐ Facebook Page ☐ Instagram ☐ Business website address (if any):

Who is your target market:

What current marketing strategies or tactics have you tried in the past?

Do you have any preferred marketing channels or platforms - if yes provide more information: ☐ Yes ☐ No

Please provide additional information/notes on services you require:

### More Information :

- Highvel Centre, c/o Charles de Gaulle & Logan Avenue, Centurion
- +27 84 5005 866 (Office)
- info@newdusk.co.za
- www.newdusk.co.za

THANK YOU

### Consent:

By submitting this form, I agree to provide accurate information to the best of my knowledge. I understand that this information will be used for accounting/consulting/marketing purposes. I authorize Newdusk Pty Ltd to contact me using the information provided.

Complete the form and email to: info@newdusk.co.za