

**CPAmatchup  
Form A**

Name of practitioner or firm name

Address

Reason for contact

If Transferee without client base,  
explain

Length of time in  
business/profession  
Experience (prior positions)

Types of clients (write up, tax,  
etc.)  
Percentage mix by type

Industries served

Estimated annual fees collected

Services rendered

Comments

Type of transaction willing & able  
to do.