

DIRECTIONS: Locate all credential information (usernames and passwords) for the following accounts. With this credential information, we are able to efficiently set up the structure for your business financial systems. **Tips:** Some of your passwords may be saved with a password manager (i.e., Google).

***Only complete the information that is relevant to you. If you do not have one of these accounts, just leave it blank.*

****This worksheet is meant to support you and keep information organized. You may record this information anywhere that is convenient for you.*

Business Bank Account(s)

Name:

Username:

Password:

Name:

Username:

Password:

Business Credit Card(s)

Provider:

Username:

Password:

Provider:

Username:

Password:



Ecommerce System (STRIPE, Accuity)

Provider:

Username:

Password:

Provider:

Username:

Password:



Other Important Business Details

Business name

Tax ID

Phone number for business

Email address for business



QuickBooks

If you have a QuickBooks account, use the **Invite an Accountant** Function and send to christina@clnbookkeepingservices.com.

THANK YOU

We look forward to connecting with you soon! If you have any questions or need additional support, please contact us at christina@clnbookkeepingservices.com