

How long have you been processing?

How are you accepting payments (terminal, POS System, gateway)?

Are you happy with your equipment or looking for additional ways to accept payments?

What are a few things you would like to change about your processing if you could?

How often do you do price increases because your fees increase?

How long does it take you to receive your funds after you batch out?

How much are you processing on average and how much are you paying in fees?

What are 2 things you would like to do to grow your business?

If you don’t mind me asking, what has held you back from doing these things?

Does any of your processing fees go towards a local charity you may want to help?

If I could help you accomplish these things, would you be interested in hearing more?

Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Statement Received? Yes or No

Notes: