

PROFESSIONAL CORPORATION CHECKLIST

Ontario professional incorporation

Use this checklist to gather information commonly requested to incorporate and organize an Ontario professional corporation. Requirements vary by profession and governing body, and the firm may request additional information after reviewing the proposed structure and agreed scope of the retainer.

Professional and Incorporation Details

Professional's full legal name:

Profession and governing body:

Proposed corporate name:

Preferred phone and email:

Documents and Information

✓	Document or information to provide
☐	Identification — Two current pieces for each individual client, as requested by the firm. Do not send identification unless requested.
☐	Professional registration — The professional's designation, registration or licence number, current status, and governing body or college.
☐	Governing-body requirements — Any current application forms, instructions, naming rules, approvals, checklists, or correspondence received from the governing body.
☐	Corporate name — Preferred name choices, exact spelling, professional designation, and any name approval or direction already received.
☐	Registered office and practice address — The full Ontario address proposed for the registered office and the professional practice address, if different.
☐	Shareholders — Full legal names, addresses, professional details, and proposed ownership interests of each shareholder, together with any permitted family or other ownership proposed.
☐	Directors and officers — Full legal names, addresses, occupations, professional details, and proposed roles of each director and officer.
☐	Share structure and accountant instructions — Written instructions from an accountant or tax professional if special share classes or tax planning are intended.
☐	Professional activities — A short description of the professional services and any related or ancillary activities the corporation is expected to carry on.
☐	Existing practice or corporation — Relevant organizational documents, business names, agreements, and accountant instructions if an existing practice or corporation is involved.
☐	Timing and signing — Any governing-body or transaction deadline, requested incorporation date, and the clients' availability to review and sign documents.

Questions or Notes

PRIVACY AND DOCUMENT SENDING Do not send original documents, identification, complete account numbers, passwords, tax records, or other sensitive documents unless requested. If requested, use the document-sending method confirmed by the firm. Confirm urgent deadlines by telephone. Sending documents does not confirm that Nobari Law has accepted a retainer or completed a review.