

M-R Fournier, CGA  
 489 Owens Rd  
 Victoria, BC V9C 2C3  
 (250) 298-6376  
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### New client questionnaire

Business Information			
Business Name:			
Business Owner(s):			
Business Address:			
Business Phone:		Business Fax	
CRA Business #			
Type of Business	Sole proprietorship	Partnership	
	Corporation	Other	
New Business:	Yes	No	
How long has your business been in operation?			
Payroll Information			
Do you have employee:			
How often are employees paid?			
Number of employees:			
Number of garnishments (if any):			
Number of subcontractors (if any):			
Reporting			
Are you a HST registrant?			
How often you need to submit GST?			
What is your payroll remittance schedule?			
Do you have an accountant? If yes, name and phone number			
Bookkeeping information			
Number of checking accounts:			
Approximate number of transaction per month:			
Is your business checking account used to pay for personal expenses?			
Do you need monthly bank reconciliation?			

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Do you use accounting software? Which one? What version?	
If you sell products, describe how many and what type of products.	
If you provide services, describe how many and type of services.	
Bookkeeping needs	
What bookkeeping services do you need?	
Set up of bookkeeping System	Yes No
A/R (Customer Invoice Billing & Tracking	Yes No
A/P (Vendor invoice Tracking & Bill Payment	Yes No
Training & Consulting Services	Yes No
Bank & Credit Card Reconciliations	Yes No
Inventory Tracking	Yes No
Payroll	Yes No
General Data Entry	Yes No
Job Cost Tracking	Yes No
Monthly/Quarterly GST, payroll remittance	Yes No
Year-end Adjusting entries	Yes No
Accountant liaison	Yes No
Tax preparation	Yes No
When will you need bookkeeping services?	
How often do you need your bookkeeping tasks and reports completed?	
Do you want onsite or offsite bookkeeping?	