



Chartered Professional Accountant  
 225 – 1855 Kirschner Road, Kelowna BC, V1Y 4N7  
 P: (236) 420 – 4801 | E: info@creeksideaccounting.ca

### CORPORATION INTAKE FORM

Company's Legal Name			
Main Contact		Signing Officer	
Phone – Cell		Phone – Office	
Best Email			
Business Year End Date			
CRA/GST Number		PST Number	

#### Mailing Address

Street Address	
City, Province, Postal Code	

### OPTIONAL ADD-ONS

Paper Copy of Year End Documents	\$25	<input type="checkbox"/> Yes <input type="checkbox"/> No	A printed and bound copy of your year-end documents. Not quite ready to trust PDFs? We've got you covered. Request paper documents to have it done the 'old-fashioned way'.
No-Hassel Document Return	\$35	<input type="checkbox"/> Yes <input type="checkbox"/> No	We'll package and mail your yearend paper documents to you upon the completion of your services. Save time on pickup by having your documents mailed.
Expedited Services	\$125	<input type="checkbox"/> Yes <input type="checkbox"/> No	Jump the line and have your yearend prepared more quickly. We'll prioritize your year-end to get you in and out more quickly.
Audit Response Package	\$145	<input type="checkbox"/> Yes <input type="checkbox"/> No	When purchased in conjunction with tax return services, an Audit Response package provides first-responder services in the event of an audit.
Financial Statements (Compiled)	\$395	<input type="checkbox"/> Yes <input type="checkbox"/> No	Financial statements are an official document package you can provide to bankers or lenders to obtain financing or acquire/maintain a lease. They are excellent for managerial review and provide an informative summary of your business's health.

### BOOKKEEPER'S INFORMATION

Bookkeeper's Name			
Phone		E-Mail	
Software Utilized		Password	

### CORPORATE LAWYER'S INFORMATION

Lawyer's Name		Lawyer's Firm	
Lawyer's Email			
May we contact them to obtain any required records:	<input type="checkbox"/> Yes <input type="checkbox"/> No		

### DIRECTOR / SHAREHOLDER INFORMATION

Individual's Name		Individual's Name	
SIN		SIN	

### PREVIOUS ACCOUNTANT'S INFORMATION

Firm Name			
Contact Information			
May we contact them to obtain any required historical records:	<input type="checkbox"/> Yes <input type="checkbox"/> No		



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### HIGH-RISK AREAS

<b>Related Groups Risk</b> (Corporations Only)	Do you have a personal relationship with corporations you sell to or earn income from? <input type="checkbox"/> Yes <input type="checkbox"/> No Are you a shareholder of multiple corporations? Please list:
<b>Foreign Property Risk</b>	Do you or your corporation hold more than \$100,000 in foreign assets? This can include a \$100,000 market value investment in a US company such as Apple Inc. <input type="checkbox"/> Yes <input type="checkbox"/> No

### OTHER INFORMATION

Services requested	<input type="checkbox"/> Personal Taxes <input type="checkbox"/> Corporate Taxes <input type="checkbox"/> Bookkeeping <input type="checkbox"/> Payroll <input type="checkbox"/> PST <input type="checkbox"/> GST
Bookkeeping program preference	<input type="checkbox"/> Sage50 <input type="checkbox"/> QuickBooks Online
First time filing a corporate tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How did you hear about us?	
How would you like to authorize Creekside Accounting as a representative (required before services can begin)?	<input type="checkbox"/> Grant immediate access through your personal CRA <a href="#">MyBusiness</a> account: <ul style="list-style-type: none"> <li>• Creekside Accounting Ltd.'s business number: <b>755066693</b></li> <li>• <b>Level 2 Access &gt; No Expiry Date (please)</b></li> </ul> <input type="checkbox"/> I will sign an authorization form (this may take several e-filing / re-signature attempts)

### SERVICE PREFERENCES

What are your expectations for our services?	
Your preferred communication method:	<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Text

Questions for the accountant? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_