



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

Would you like to add financial statements to your services for \$350?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Financial statements are an official document package you can provide to bankers, lenders, and landlords to obtain financing or acquire / maintain a lease. They are also excellent for managerial review and provide you an informative summary of your business's health.
Would you like to purchase a \$145 Audit Response package?	<input type="checkbox"/> Yes <input type="checkbox"/> No	When purchased in conjunction with tax return services, a \$145 Audit Response investment provides first-responder services free of charge in the event of an audit.
Would you like to expediate the preparation of your return for \$125 per person?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Jump the line and have your tax returns prepared more quickly with a \$125 investment. We'll prioritize your year end to get you in and out more quickly.
Would you like to save time and purchase a \$35 no hassle document return option?	<input type="checkbox"/> Yes <input type="checkbox"/> No	With a \$35 no hassle document return option we'll package and mail your yearend documents to you upon the completion of your tax services. Save time on pickup by having your documents mailed.

BOOKKEEPER'S INFORMATION

Bookkeeper's Name			
Phone		E-Mail	
Software Utilized		Password	

CORPORATE LAWYER'S INFORMATION

Lawyer's Name		Lawyer's Firm	
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

Individual's Name		Firm Name	
Contact Information			
Reason for Change			
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

Related Groups Risk (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:
Foreign Property Risk	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

What type of services do you need?	<input type="checkbox"/> Personal Taxes <input type="checkbox"/> Corp Tax (T2 Only) <input type="checkbox"/> Financial Statements <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
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 MyBusiness account or by calling the CRA (1-800-959-8281): <ul style="list-style-type: none"> • Creekside Accounting Ltd.'s business number 755066693 • Level 2 Access > No Expiry Date (please) <input type="checkbox"/> I will sign an authorization form provided by Creekside (takes 2 – 14 days for CRA to process)

OTHER INFORMATION CONTINUED

How did you hear about us?	
What are your expectations for our services?	
Your preferred communication method:	<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Text
Preferred records format:	<input type="checkbox"/> Paper <input type="checkbox"/> Electronic / PDF

Any questions for the accountant? _____

Client Name: _____ Date: _____