# BUSINESS CONTACT INFORMATION

|  |  |  |  |
| --- | --- | --- | --- |
| Company’s Legal Name |  | Corporation | Sole proprietorship |
| CRA/GST Number |  | PST Number |  |
| Mailing Address |  | | |
| Main Contact |  | Signing Officer |  |
| Phone – Cell |  | Phone - Office |  |
| Email |  | | |
| Business Year End |  | | |

# 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: | | Yes  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: | | Yes  No | |

# High risk areas

|  |  |
| --- | --- |
| **Related Groups Risk** (Corporations Only) | Do you have a personal relationship with corporations you sell to or earn income from?  Yes  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.  Yes  No |
| Other information | |
| What type of services do you need? | Personal Taxes  Corp Tax (T2 Only)  Financial Statements  Bookkeeping Payroll PST GST |
| Bookkeeping program preference | Sage50  QuickBooks Online |
| How would you like to authorize Creekside Accounting as a representative (required before services can begin)? | Grant immediate access through your personal CRA [MyBusiness](https://www.canada.ca/en/revenue-agency/services/e-services/e-services-businesses/business-account.html) account or by calling the   CRA (1-800-959-8281):   * Creekside Accounting Ltd.’s business number **755066693** * **Level 2 Access > No Expiry Date (please)**   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? |  |
| Why did you decided to use our firm over our competitors? |  |
| Your preferred communication method: | Phone  Email  Text |
| Preferred records format: | Paper  Electronic / PDF Download Required by Client |
| Would you like a wrap up meeting (to review, sign, and pickup)? | Yes – In Person  Yes – By Phone No – By Portal/Email/Mail – recommendations provided by email |

## Any questions for the accountant?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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