



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

BUSINESS CONTACT INFORMATION

Company's Legal Name		<input type="checkbox"/> Corporation	<input type="checkbox"/> 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:	<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		

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)



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OTHER INFORMATION CONTINUED

How did you hear about us?	
Why did you decided to use our firm over our competitors?	
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 Download Required by Client
Would you like a wrap up meeting (to review, sign, and pickup)?	<input type="checkbox"/> Yes – In Person <input type="checkbox"/> Yes – By Phone <input type="checkbox"/> No – By Portal/Email/Mail – recommendations provided by email

Any questions for the accountant? _____

Client Name: _____ Date: _____