



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

INCORPORATION UPDATE FORM

Company's Name	
Address (if changed)	
Phone (if changed)	
Email (if changed)	

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.

ANNUAL INQUIRIES

Related Groups Risk	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
Preferred Communication	<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Text

ADVISOR UPDATES (IF CHANGED)

Bookkeeper Changes

Bookkeeper Name			
Phone		E-Mail	
Software Utilized		Password	

Lawyer Changes

Lawyer's Name		Lawyer's Firm	
Lawyer's Email			

Shareholders / Director's Changes

Individual's Name		Individual's Name	
SIN		SIN	

Questions for the accountant? _____

Client Name: _____ Date: _____