



Chartered Professional Accountant  
 225 – 1855 Kirschner Road, Kelowna BC, V1Y 4N7  
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## INCORPORATION UPDATE FORM

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

## 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.

## 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
Preferred records format:	<input type="checkbox"/> Paper <input type="checkbox"/> Electronic / PDF

## ADVISOR UPDATES (IF CHANGED)

### Bookkeeper Changes

Bookkeeper Name			
Phone		E-Mail	
Software Utilized		Password	

### Lawyer Changes

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

### Shareholders / Directors Changes

Individual's Name		Individual's Name	
SIN		SIN	

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

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