



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)	

ANNUAL INQUIRIES

Type of services requested	<input type="checkbox"/> Corporate Tax Return <input type="checkbox"/> Financial Statements (extra fee) – best for mortgage, landlord, lender, etc.
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

OTHER INFORMATION CONTINUED

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 Download Required by Client
Would you like a wrap up meeting (to review, sign, and pickup documents)?	<input type="checkbox"/> Yes – In Person <input type="checkbox"/> Yes – By Phone <input type="checkbox"/> No – By Portal/Email/Mail – recommendations provided by email

BOOKKEEPER UPDATE (IF CHANGED)

Bookkeeper Update	
Phone	E-Mail
Software Utilized	Password

CORPORATE LAWYER UPDATE (IF CHANGED)

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 UPDATE (IF CHANGED)

Individual's Name	Individual's Name
SIN	SIN

Any questions for the accountant? _____

Client Name: _____ Date: _____