

# Island Pacific Accounting and Tax Services

## Business Tax Information Form

### Island Pacific Accounting – Business Tax Information Form

#### 1. Business Information

- **Legal Business Name:** \_\_\_\_\_
  - **Operating / Trade Name (if different):** \_\_\_\_\_
  - **Business Number (BN):** \_\_\_\_\_
  - **Business Structure:**  
☐ Sole Proprietor ☐ Partnership ☐ Corporation
  - **Incorporation Date (if applicable):** \_\_\_\_ / \_\_\_\_ / \_\_\_\_
  - **Fiscal Year-End:** \_\_\_\_\_
  - **Business Address:** \_\_\_\_\_
  - **City:** \_\_\_\_\_ **Postal Code:** \_\_\_\_\_
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#### 2. Contact Information

- **Primary Contact Name:** \_\_\_\_\_
  - **Title / Role:** \_\_\_\_\_
  - **Phone Number:** \_\_\_\_\_
  - **Email Address:** \_\_\_\_\_
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#### 3. Tax Services Required

- ☐ T2 Corporate Tax Return
- ☐ T1 Business / Self-Employed Income
- ☐ GST/HST Filing
- ☐ Payroll (T4/T5)
- ☐ Tax Planning & Advisory
- ☐ Catch-up / Prior-Year Filings

**Tax Year(s) to File:** \_\_\_\_\_

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#### 4. Business Activity

- **Nature of Business:** \_\_\_\_\_
- **Main Revenue Source(s):** \_\_\_\_\_

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- **Approximate Annual Revenue:**

☐ Under \$50,000 ☐ \$50,000–\$250,000 ☐ Over \$250,000

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## 5. Accounting & Records

- Bookkeeping maintained? ☐ Yes ☐ No
  - Accounting software used (if any): \_\_\_\_\_
  - Financial statements available? ☐ Yes ☐ No
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## 6. Income & Expenses (Check all that apply)

### Income:

- ☐ Sales / Service Revenue  
☐ Rental Income  
☐ Other: \_\_\_\_\_

### Expenses:

- ☐ Office & Supplies  
☐ Vehicle Expenses  
☐ Home Office  
☐ Professional Fees  
☐ Meals & Entertainment  
☐ Other: \_\_\_\_\_
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## 7. GST / HST Information

- Registered for GST/HST? ☐ Yes ☐ No
  - GST/HST Number: \_\_\_\_\_
  - Filing Frequency: ☐ Monthly ☐ Quarterly ☐ Annually
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## 8. Foreign / Cross-Border Information

- Foreign income or assets? ☐ Yes ☐ No
- Non-resident owners? ☐ Yes ☐ No
- Countries involved: \_\_\_\_\_

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## 9. Documents to Attach / Upload

- Financial statements
  - Bank statements
  - Expense receipts
  - GST/HST records
  - Payroll records
  - Prior-year tax returns
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## 10. Additional Notes

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## Privacy & Consent

All information provided is confidential and handled in accordance with Canadian privacy laws. By submitting this form, you authorize Island Pacific Accounting & Tax Services to use the information for business tax preparation and related services.