

BUSINESS CLIENT INTAKE QUESTIONNAIRE

Corsair Finance and Accounting Consulting Services

1. Client Information

- Full Legal Name:
- Business Name (if applicable):
- Email Address:
- Phone Number:
- Preferred Method of Communication:

2. Business Identification

- Business Structure:
 - Sole Proprietorship
 - Corporation
 - Partnership
- Business Number (BN):
- GST/HST Number (if registered):
- Incorporation Date (if applicable):
- Fiscal Year-End:

3. Business Overview

- Brief description of your business activities:
- Industry:
- How long have you been operating?

4. Financial Information

- Estimated Annual Revenue:
- Estimated Annual Expenses:
- Do you have existing bookkeeping records?
 - Yes No

- Current bookkeeping method:
 Excel Software (please specify): _____ None
- Are your bank accounts and credit cards used exclusively for business?
 Yes No

5. Payroll & Workforce

- Number of employees:
- Do you have subcontractors?
 Yes No
- If yes, how many?
- Are payroll remittances currently up to date with the Canada Revenue Agency?
 Yes No Not sure

6. Tax & Compliance

- Have you filed all prior year tax returns?
 Yes No
- Are there any outstanding balances or notices from the Canada Revenue Agency?
 Yes No
- GST/HST filing frequency:
 Monthly Quarterly Annually Not registered

7. Services Required

Please select the services you are looking for:

- Bookkeeping
- Payroll & Remittances
- GST/HST Filing
- Corporate Tax Return (T2)
- Personal Tax Return (T1)
- Financial Statements

Advisory / Consulting

Other: _____

8. Additional Information

- What are your main challenges with accounting or finances?
- What are your goals for your business this year?

9. Authorization & Acknowledgment

I confirm that the information provided is accurate to the best of my knowledge and understand that additional documentation may be required.

Signature: _____

Date: _____

Thank you for taking the time to complete this questionnaire. This helps us better understand your business and provide tailored, high-quality service.