

CLIENT CONSULTATION QUESTIONNAIRE
Corsair Finance and Accounting Consulting Services

1. Personal Information

- **Full Name:**
- **Email Address:**
- **Phone Number:**
- **Preferred Method of Communication:**

2. Employment & Income Overview

- **Current Employment Status:**
 Employed Self-Employed Business Owner Unemployed Student
- **Employer Name (if applicable):**
- **Job Title / Occupation:**
- **Do you have any additional sources of income?**
 Yes No

If yes, please specify (e.g., rental, side business, investments):

3. Family & Personal Situation

- **Marital Status:**
 Single Married Common-law Divorced Widowed
- **Do you have children or dependents?**
 Yes No

If yes, how many?

4. Consultation Focus

What would you like to discuss during the consultation? (Select all that apply)

- Personal income tax return (T1)**
- Self-employment / side business income**
- Starting a business**

- Tax planning and strategies to save on taxes
- Available tax credits and deductions
- GST/HST registration and obligations
- Payroll or hiring employees
- CRA notices or issues
- Other: _____

5. Current Tax Situation

- Have you filed your most recent tax return?
 Yes No
- Do you currently owe any amounts or have outstanding issues with the Canada Revenue Agency?
 Yes No Not sure
- Are you registered for GST/HST?
 Yes No Not sure

6. Documentation (if applicable)

Please indicate which documents you currently have available:

- T4 (employment income)
- T4A (self-employed/contract income)
- T5 (investment income)
- Business income & expense records
- GST/HST records
- Previous year tax return
- Receipts for deductions/credits (medical, childcare, donations, etc.)
- Other: _____

7. Goals & Expectations

- **What is your main goal for this consultation?**
- **Are there specific questions or concerns you would like addressed?**

8. Additional Information

Please share any other details that may help us better understand your situation:

9. Confidentiality Notice

All information provided will be kept strictly confidential and used solely for the purpose of providing accounting and consulting services. Your information will not be shared with any third party without your consent, except where required by law, including requests from government authorities for legal purposes or investigations supported by a valid court order.

Thank you for completing this questionnaire. This will help us prepare for your consultation and provide tailored, efficient guidance.