

ELEV8BOOKS

BOOKKEEPING & TRAINING

YOUR FINANCES SYNCED

New Client Information Form

Please complete this form before your initial consultation.

BUSINESS & CONTACT INFORMATION

Legal Business Name

Operating / Trade Name

Primary Contact

Title / Role

Email

Phone

Business Address

City / Province

Postal Code

Website

BUSINESS DETAILS

Business Structure

☐ Sole Proprietorship ☐ Corporation ☐ Partnership ☐ Other

Industry / Type of Business

Fiscal Year-End

Years in Business

Approx. Monthly Transactions

Number of Employees

CURRENT BOOKKEEPING SETUP

Current Accounting Software

☐ QuickBooks Online ☐ Other ☐ None / Not Sure

Other software / apps currently used

How often are your books currently updated?

☐ Daily ☐ Weekly ☐ Monthly ☐ Behind / Catch-up Needed ☐ Not Sure

New Client Information Form

Bookkeeping, payroll and filing needs

SERVICES YOU MAY NEED

- | | |
|---|--|
| ☐ Full-Cycle Bookkeeping | ☐ Payroll |
| ☐ HST Filing | ☐ WSIB |
| ☐ EHT | ☐ Accounts Payable |
| ☐ Accounts Receivable | ☐ Monthly Reporting |
| ☐ Cash Flow Support | ☐ Software / Bookkeeping Training |
| ☐ Catch-up / Clean-up | |

REGISTRATIONS & PAYROLL

HST Registered?

☐ Yes ☐ No ☐ Not Sure

Payroll Account?

☐ Yes ☐ No ☐ Not Sure

WSIB Registered?

☐ Yes ☐ No ☐ N/A / Not Sure

EHT Applicable?

☐ Yes ☐ No ☐ Not Sure

ACCOUNTS & RECORDS

Number of business bank accounts

Credit cards

Loans / lines of credit

What would you most like help with?

Anything else we should know before your consultation?

Security: Do not enter passwords, online banking credentials, SINs, credit card numbers or login information on this form.