



# CANADA WEST ACCOUNTANTS LTD

## Business Incorporation Services Checklist Form

### Client Information

Client Name: \_\_\_\_\_

- **Business Name (if applicable):** \_\_\_\_\_
- **Contact Person:** \_\_\_\_\_
- **Email Address:** \_\_\_\_\_
- **Phone Number:** \_\_\_\_\_
- **Mailing Address:** \_\_\_\_\_

### 1. Business Structure

- **Corporation Type (check one):**
  - **Federal Incorporation** (for nationwide operation)
  - **Provincial Incorporation** (for specific province)
  - **Non-Profit Organization**
  - **Cooperative**
- **Industry:** \_\_\_\_\_
- **Business Purpose:** \_\_\_\_\_

### 2. Business Name Details

- **Proposed Business Name:** \_\_\_\_\_
- **NUANS Report** (if applicable for name availability check):
  - **NUANS Name Search Completed**
  - **Name Reserved (if applicable)**
- **Name Registration** (choose one):
  - **Registered Business Name**
  - **No Registration Needed** (e.g., using personal name)

### 3. Incorporation Details

- **Province of Incorporation** (if provincial):
  - Ontario
  - British Columbia
  - Alberta

- **Incorporation Date** (preferred date): \_\_\_\_\_
- **Director Information:**
  - Number of Directors: \_\_\_\_\_
  - Are all directors Canadian residents? ☐ Yes ☐ No
  - **List of Directors** (names, addresses, email):
    - Director 1: \_\_\_\_\_
    - Director 2: \_\_\_\_\_
    - Director 3: \_\_\_\_\_

#### 4. Share Structure

- **Number of Shares to Issue:** \_\_\_\_\_
- **Types of Shares:**
  - Common
  - Preferred
  - Other: \_\_\_\_\_
- **Shareholder Details:**
  - Number of Shareholders: \_\_\_\_\_
  - **List of Shareholders:**
    - Shareholder 1: \_\_\_\_\_
    - Shareholder 2: \_\_\_\_\_

#### 5. Legal & Financial Information

- **Business Number (BN) Registration:**
  - **Requested from CRA** (Canada Revenue Agency)
- **GST/HST Registration** (if applicable):
  - **Required** (business revenue over \$30,000)
  - **Not Required** (business revenue under \$30,000)
- **Tax Information:**
  - **Corporation Tax Account**
  - **Payroll Account** (if applicable)
- **Registered Address for Incorporation:**
  - **Address Provided:** \_\_\_\_\_

## 6. Required Documentation

- **Articles of Incorporation:**
  - Prepared
  - Signed
- **Corporate By-Laws:**
  - Prepared
  - Signed
- **Shareholder Agreement** (if applicable):
  - Prepared
  - Signed
- **Director Resolutions** (if applicable):
  - Prepared
  - Signed

## 7. Additional Services (if required)

- **Registered Agent** (if applicable):
  - Required (e.g., for federal incorporation or non-resident)
- **Business License** (if applicable):
  - Required
  - Not Required
- **Trademark Registration:**
  - Requested
- **Domain Name Registration:**
  - Requested
- **Website Hosting & Setup** (if applicable):
  - Requested

## 8. Client Expectations & Timeline

- **Preferred Incorporation Date:** \_\_\_\_\_
- **Expected Start Date for Business Operations:** \_\_\_\_\_
- **Other Important Deadlines or Milestones:** \_\_\_\_\_

- **Client's Desired Communication Frequency:**

- Weekly Updates
- Bi-Weekly Updates
- Monthly Updates

## **9. Finalizing the Incorporation Process**

- **Incorporation Forms Submitted:**

- **Federal Forms Submitted** (for federal incorporation)
- **Provincial Forms Submitted** (for provincial incorporation)

- **Incorporation Certificate Received:**

- **Federal**
- **Provincial**

- **Client's Corporate Records Book Set Up:**

- **Corporate Seal**
- **Share Certificates** (if applicable)

## **10. Ongoing Support (optional)**

- **Accounting & Bookkeeping Services:**

- **Requested**
- **Not Required**

- **Tax Filing Services:**

- **Requested**
- **Not Required**

- **Annual Return Filing Service:**

- **Requested**
- **Not Required**

## **Confirmation**

- **Date of Form Completion:** \_\_\_\_\_
- **Client Signature:** \_\_\_\_\_
- **Service Provider Signature:** \_\_\_\_\_