

Corporate New Client Intake

Please complete as fully as possible. If a question does not apply, enter N/A.

Your information is used to assess your needs, prepare an engagement, and meet professional and legal obligations.

PRIMARY CONTACT

Primary contact - full legal name

Preferred name

Title / role

Phone

Email

Mailing address, city, province and postal code

Preferred contact method

- ☐ Email
- ☐ Phone
- ☐ Teams / video meeting

CORPORATION DETAILS

Full legal corporate name

Operating / trade name(s)

Website

Registered office address (if different)

Main business address (if different)

Corporate Profile & Ownership

LEGAL REGISTRATION

Incorporation number	Date incorporated (YYYY-MM-DD)	Jurisdiction

CRA Business Number (9 digits)	Fiscal year-end (MM-DD)	Industry / NAICS (if known)

Describe the corporation's principal business activities and sources of revenue

DIRECTORS, OFFICERS AND SHAREHOLDERS

List all directors/officers and shareholders. Attach a current share register or corporate profile if available.

Full legal name	Role	Ownership %	Address / residency

INDIVIDUALS WITH SIGNIFICANT CONTROL

Identify anyone who owns, controls or directs 25% or more, or otherwise has significant control

☐ Ownership changed during the current or prior fiscal year

☐ No ownership changes

Related companies, partnerships, trusts or holding companies (names and relationship)

Tax Accounts & Filing History

CRA PROGRAM ACCOUNTS

- | | | |
|--|---|---------------------------------------|
| ☐ RC - Corporate income tax | ☐ RT - GST/HST | ☐ RP - Payroll |
| ☐ RZ - Information returns | ☐ RM - Import/export | ☐ Other |

Program account numbers and filing frequencies

CORPORATE TAX FILING HISTORY

Last T2 year filed

Date assessed / reassessed

Years outstanding, if any

- | | | |
|--|---|---|
| ☐ CRA balance owing | ☐ No known CRA balance | ☐ Payment arrangement exists |
|--|---|---|

Balance owing, notices, reviews, audits, objections or other CRA matters

GST/HST

Registration effective date

Filing frequency

Last period filed

- | | | | |
|--------------------------------------|---|---------------------------------------|---------------------------------|
| ☐ Cash method | ☐ Accrual method | ☐ Quick Method | ☐ Unsure |
|--------------------------------------|---|---------------------------------------|---------------------------------|

Provinces/territories where sales are made; describe any zero-rated, exempt or out-of-Canada sales

Accounting, Bookkeeping & Payroll

ACCOUNTING RECORDS

☐ QuickBooks Online ☐ QuickBooks Desktop ☐ Sage ☐ Other

Software, version and subscription owner

Where records are stored

☐ Cash basis ☐ Accrual basis ☐ Unsure ☐ Books are current

Date books are complete to; describe unreconciled accounts, cleanup needed or missing records

BANKING, FINANCING AND PAYMENT PROCESSING

Number/type of bank and credit-card accounts (do not include account numbers or passwords)

Loans, leases, shareholder loans and financing

Payment processors / online sales platforms

PAYROLL

☐ No payroll ☐ Employees ☐ Contractors ☐ Both

Number of employees

Pay frequency

Payroll software / provider

☐ Regular remitter ☐ Quarterly remitter ☐ Accelerated / unsure

Payroll start date, last remittance, benefits, taxable benefits, WCB account and any outstanding issues

Services & Previous Accountant

OTHER FILING OBLIGATIONS

☐ T4 ☐ T4A ☐ T5 ☐ T5018 ☐ T1135 ☐ Charity / NPO

Other returns, elections, foreign reporting, provincial taxes or deadlines

SERVICE NEEDS

☐ T2 corporate return ☐ Year-end financial statements ☐ Bookkeeping
☐ GST/HST ☐ Payroll ☐ Advisory / tax planning ☐ Cleanup

PREVIOUS ACCOUNTANT / BOOKKEEPER

Firm / accountant / bookkeeper name

Contact person

Email

Phone

Reason for changing accountants or engaging a new firm

☐ I authorize Rhonda S. Hemsing CPA to contact the previous accountant/bookkeeper for relevant records.

Transition notes, records expected from the previous firm, or other details

Records & Secure Delivery

RECORDS CHECKLIST

- ☐ Articles/certificate of incorporation
- ☐ CRA notices and online mail
- ☐ Prior financial statements
- ☐ Bank and credit-card statements
- ☐ GST/HST returns and working papers
- ☐ Fixed-asset listing and purchase documents
- ☐ Corporate minute book/share register
- ☐ Prior T2 returns and assessments
- ☐ Trial balance / general ledger
- ☐ Loan and lease agreements
- ☐ Payroll reports, T4/T4A and PD7A
- ☐ Legal agreements / reorganizations

Records not available, expected delivery dates, or additional notes

SECURE DELIVERY

- ☐ Secure client portal
- ☐ Deliver to office
- ☐ Other approved method

Email to use for portal invitation

Additional authorized portal user

Authorization, Declaration & Office Use

ADDITIONAL INFORMATION

What are your main goals, concerns, deadlines, or questions for Rhonda?

How did you hear about Rhonda?

Referred by

PRIVACY AND ELECTRONIC COMMUNICATION

I consent to Rhonda S. Hemsing CPA collecting, using and retaining the information provided for client intake, identity verification, conflict checks, engagement assessment, professional services, billing, and legal or regulatory requirements. I understand that sensitive records should be sent through the approved secure portal, not ordinary email.

☐ I consent to routine appointment, engagement and administrative communication by email.

CLIENT DECLARATION

I confirm that the information provided is complete and accurate to the best of my knowledge. I am authorized to provide this information for the corporation. Completion of this form does not create an accountant-client relationship; services begin only after acceptance, identity verification, and a signed engagement letter (and retainer, if required).

Authorized signer's full name

Title / capacity

Date (YYYY-MM-DD)

Electronic signature - type full legal name

OFFICE USE ONLY - RHONDA S. HEMSING CPA

Date received

Assigned to

Client ID

Year-end

☐ Identity verified

☐ Conflict check complete

☐ Engagement signed

☐ Retainer received

☐ CRA authorization complete

☐ Portal established