



New Corporate Client Intake Form

Company Information

Company Name _____

Address _____

CRA Business Number _____

Incorporation Date (if recently incorporated) _____
(year/mm/dd)

Year-end Date (if available) _____
(year/mm/dd)

Shareholders

Name _____ SIN _____ Title _____

Name _____ SIN _____ Title _____

Name _____ SIN _____ Title _____

Primary Contact

Name _____

Address _____

Email _____

Contact Numbers _____
work cell home

Do you own other companies? Yes ☐ No ☐

Company name(s) _____

Have you registered for a GST/HST account? Yes ☐ No ☐

Have you registered for a payroll account? Yes ☐ No ☐

Other Professionals

Please provide the name and telephone number

Lawyer _____ Telephone _____

Financial Planner _____ Telephone _____

Other _____ Telephone _____

Please provide copies of the following documents (where applicable) at the initial meeting:

New & Existing companies (prepared by lawyer)

Legal Incorporation Letter

Articles of Incorporation

Shareholder Register

Corporate Organization Chart

Existing companies only

Copy of prior year financial statements

Copy of prior year trial balance

Adjusted journal entry

If you require Personal Tax Service, please complete the New Client Personal Tax form



New Corporate Client Initial Meeting
for discussion purposes

Initial Meeting Date _____

Please check all that apply

☐ Section 85 Roll-over ☐ Form AUT-01 Authorize a Representative ☐ HST ☐ Payroll
☐ T4 ☐ T5 ☐ T3 (trusts only) ☐ T2 ☐ T5018 Other _____

Foreign Property/Investments/Stocks (Includes US)

Did the corporation own/hold any foreign property ☐ Yes ☐ No

Company Details

Description of the business (industry, business activities, foreign activity) _____

Is bookkeeping required? ☐ Yes ☐ No

Bookkeeper's Name and Contact Number _____

Name of accounting software package _____

User Name _____ Password _____

Business bank account(s) _____

Lines of Credit _____

Loans _____ Loan Covenants _____

Company credit cards? ☐ Yes ☐ No Card number(s) _____

HST number (if available) _____ HST Reporting frequency _____

HST reporting period(s) _____

Number of employees on payroll _____ Payroll frequency _____

WCB (if registered) what is the company's WCB rate? _____

Shareholder remuneration plan _____

Redeemable shares from past tax re-organizations _____

Sub-contractors _____

Home office ☐ Yes ☐ No Details _____

Company vehicle(s) ☐ Yes ☐ No Details _____

Auto allowance for use of a personal vehicle ☐ Yes ☐ No Details _____

Special or unique details to note about the business _____

Business/tax planning issues

Does the company have plans to obtain financing - i.e., for expansion or building?

Does the company require exit strategies (sale of business/transition to others/ insurance? A minimum of two years is required to do this efficiently.

Changes in income splitting opportunities Partnership agreement.

Will compiled financial information be used by 3rd parties?

Basis of accounting