

Corporate Client Intake Form

General Information					
Business Name:			Fiscal Year end date:		
Physical Address:					
City:	Province:	Postal Code:			
Mailing Address:					
City:	Province:	Postal Code:			
Main Phone:			Fax:		
Website:			CRA Business Number #:		
Main Contact Name:					
Title:			Email:		
Work Phone:			Cell Phone:		
Shareholder Information					
Shareholder name	Title	# shares issued	Type/Class	Share Certif.#	Social Ins. Number
Related Company Information					
Name of related company	CRA number	Fiscal year-end		Type of relationship	
Business Advisors					
Bank:			Types of Accounts:		
Bank address:			Years with this financial institution:		
Name/contact info of Primary Banking Officer					
Do you have loans with the bank? <input type="checkbox"/> Yes <input type="checkbox"/> No		Number of days after YE to provide financials?		<input type="checkbox"/> N/A	

Law Firm of Counsel:

Name/contact info of Legal Counsel:

Current Financial Advisor(s):

Have you informed your previous Accountant/Advisor that you are meeting with us?

Do you have an outstanding balance with your previous Accountant/ Advisor?

Services

How did you learn about us?

Is there a specific reason for which you contacting us? What are your expectations from your accountant/advisor?

What are your most important service issues?

Have you informed your previous Accountant/Advisor that you are meeting with us? Yes No

What Services are you interested in discussing with us?

- | | |
|---|---|
| <input type="checkbox"/> Bookkeeping / Collaborative Accounting | <input type="checkbox"/> Strategic Planning / Budgeting |
| <input type="checkbox"/> Controllership | <input type="checkbox"/> Profit Counselling |
| <input type="checkbox"/> Year-end financial statements / tax return preparation | <input type="checkbox"/> Merger & Acquisition |
| <input type="checkbox"/> Training services (accounting systems) | <input type="checkbox"/> Succession Planning |
| <input type="checkbox"/> Tax Planning | <input type="checkbox"/> Other (explain) |

How often would you like to meet with your accountant/advisor? Do you expect your account/advisor to contact you unilaterally throughout the year? (eg. Would you like to have quarterly budget/planning meetings?)

What type of year-end engagement do you require?

- Notice to Reader/Compilation Review Engagement Audit Not sure (Ask me to explain!)

What accounting system do you currently use in your business?

Are you happy with your current accounting system? *Why or why not? (eg. Does it give you information to help manage your business and maximize profits?)*

Please list any other items that you feel strongly about that we have not covered in this questionnaire