

NEW CLIENT INFORMATION

You are invited to fill out and print this form prior to meeting but it is not required.

BUSINESS

Name Date

Referred By

Corporation Proprietorship Accountant

Year End Date

Date of Incorp/Inception

Corp # Principles/Directors

CRA Business #

Industry

Address Shareholders

CONTACT

Owner Name(s)

Phone Phone #2

Email Fax

DETAILS

Business Bank Account at

Cheques (Handwrite or print)

Insurance

WCB

GST (annually, quarterly, etc.)





Memberships/ Dues

Bank Loans

Corporate Tax

Payroll

Shareholder Wage

Company Vehicles

Building/Land Owned

Equipment/Machinery

T4/T5018

Home office

Employee Benefits Paid

Accounting Software Used

Drop Off Frequency (how often you will drop off your records)

Sabine MacDonald

Professional Bookkeeper



100-150 Chippewa Rd,
Sherwood Park, Alberta T8A 6A2



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