New Client Information Form

Please complete this form so we can set up your file. Your information is kept confidential and used only to provide our services.

About you

Full legal name or business name

Phone

Email

Preferred contact method

Mailing address

Business details (if applicable)

Business type (sole proprietor, corporation...)

Fiscal year end

HST registered (yes/no)

HST filing frequency

Payroll (yes/no)

Accounting software used (or none)

Services you need

Services requested

Deadlines or notices from CRA we should know about (or none)

Consent

I confirm this information is accurate. I understand that to deal with the CRA on my behalf, I will also need to authorize the Firm through the CRA's own online or paper authorization process.

Client

Signature

Full name

Date