

STERLING STANFORD

CHARTERED PROFESSIONAL ACCOUNTANTS

Legal Name: _____

Operating Name (if different): _____

Year End: _____

Address: _____

Contact person: _____

Phone: _____

Email: _____

Business Number: _____

Nature of business: _____

- Documents to provide:**
- Incorporation certificate and related documents
 - Share ledger
 - Last year's financial statements (if applicable)
 - Last year's corporate tax return (if applicable)

Are you registered/set up for the following:

- CRA My Business Account
- GST Filing frequency: _____
- PST Filing frequency: _____
- WCB Filing frequency: _____
- EHT Filing frequency: _____
- Payroll
- How is this prepared? _____
- How many employees do you have? _____

Tell us a bit about your business and how we can help you.

What accounting software do you use?

Who does the bookkeeping?

How often is the bookkeeping done?

Monthly, Quarterly, Annually

Do you provide your financial statements to a third-party and if so, who?

Why are you looking for a new accountant?

How did you hear about us?
