



Davis Accounting & Tax

Professional Corporation

CHARTERED PROFESSIONAL ACCOUNTANT

New Business Client Profile Form

Structure of Business:

Corporation Partnership Sole Proprietor Other:

Business Information:

Legal Name: Operating Name:

Fiscal Year End Date: [Click here to enter a date.](#) Business Number:

Address: City: Postal Code:

Phone: Fax: Email:

Nature of Business:

Shareholder Information

Number of Shareholders:

Please complete the following: names, titles, and telephone numbers of shareholders, directors, officers, partners, and managers:

Current Accounting/Bookkeeping Processes:

Accounting Program: Microsoft Excel Manual/Paper/Other

Bookkeeping Contact: Name: Phone:

Is bookkeeping up to date? YES NO If no, to what date is it complete:

Date last GST return filed with CRA:

Date last tax return filed with CRA:

Date last Annual Return Filed (with Registries):

White Oaks Professional Center, Suite 203, 12222 137 Avenue NW, Edmonton, Alberta, T5L 4X5



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Some Basic Questions to get to know you better

New Client Questions:

1) Who in the organization will be making the final decisions on our services?

2) What are your goals and timeline for our services?

3) Who did your tax return/financial statement compilation in the past?

4) Why are you interested in a new accountant?

5) What are you looking for (in an accountant) that you don't have currently?

6) How many employees do you currently have?

7) According to CPA Regulations, as a registered public accountant I must make contact with the predecessor accountant prior to providing services

-May I contact previous accountant if needed? YES NO

Name of Previous Accounting Firm:

Contact at Previous Accounting Firm:

Phone Number:

Email Address:

Years Services were provided by Previous Firm:

I certify that the above stated facts are true and correct, to the best of my knowledge.

Name:

Position:

Date:

Signature: _____

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