

## ***BUSINESS CLIENT INFO SHEET & CONTACT DETAILS***

### **Client Information**

Legal name: \_\_\_\_\_

Operating name: \_\_\_\_\_

Business number: \_\_\_\_\_ Year-end date: \_\_\_\_\_

Business address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal: \_\_\_\_\_

Business Phone #: \_\_\_\_\_ Fax Phone #: \_\_\_\_\_

Email address: \_\_\_\_\_

Would you like to be added to our newsletter mailing list: Yes No

How did you hear about us?: \_\_\_\_\_

For all our clients we prepare a letter to the lawyer to assist with keeping the minute book up to date.

Would you like us to send this letter to your lawyer: Yes No

If yes: Name of Lawyer or legal firm name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal: \_\_\_\_\_

### **Shareholder Information**

Name of shareholder(s)	Business/Partnership SIN Numbers	% Common Shares	% Preferred Shares

Who has signing authority: \_\_\_\_\_

### **Requested Services**

Audit: Review: Compilation :

Bookkeeping services: Monthly: Quarterly: Annually:

Payroll services: Weekly: Bi-weekly: Twice monthly: Monthly:

GST/PST services: Monthly: Quarterly: Annually: