

Corporate Questionnaire

First Name

Last Name

Phone number

Email address

What is the corporation's year-end date?

Day

Month

Are your corporate tax return filings up to date?

☐ Yes

☐ No

- 1** Tell us about your business (products sold, services provided, location, etc)

- 2** What type of engagement do you require (T2 Only, Compilation, Review, Audit)?

- 3** Does the corporation have any bank reporting requirements or Covenants?
(example: Financial Statements need to be issued within 120 days)

- 4** Do you have a login for your My CRA Business Account?

☐ Yes

☐ No

- 5** Do you need any additional services (bookkeeping, consulting, personal taxes, other)?

- 6** What program are you currently using to prepare your bookkeeping?

7 Who takes care of the bookkeeping (shareholder, family member, bookkeeper, etc)?

8 If this is a farm operation, are you enrolled in AgriInvest and/or AgriStability?

☐ Yes ☐ No

9 Are you a GST/HST and/or RST/PST registrant? If so, what are the filing frequencies?

10 Is this a new business?

☐ Yes ☐ No

11 Are you looking to sell or retire soon?

☐ Yes ☐ No

12 What are your main frustrations with your current accountant?

13 What made you choose Versatile Accounting & Tax?
(please include referrals if applicable)

14 Any additional information you'd like to share?