



## New Client - Corporate Tax Information Sheet

Complete this form and email to: rozita@fcpcgroup.ca

For questions or information, call: (587) 393-8621

### General Business Information (Please scan and include all relevant information)

Name of Corporation:	Operating Name (If different):
Date of Incorporation:	Type of Business:
Date of Fiscal Year End:	CRA Business Number:
Business Start Date:	GST/HST Number:
Jurisdiction:	Provincial Account Number:

### Business Contact Information

Business Address:	City, Province, Postal Code
Business Phone Number:	Business Email:
Business Fax:	Business Website:

### Returns/Filings Required (Check as many as applicable)

<input type="checkbox"/>	NTR & T2 - Notice to Reader Financial Statements & Annual Corporate Income Tax Return
<input type="checkbox"/>	T4 - Payroll employee filings and employer summary
<input type="checkbox"/>	T5 - Dividends paid by corporation shareholder filings & employer summary
<input type="checkbox"/>	T5018 - Subcontract payments summary (Construction Industry only)
<input type="checkbox"/>	GST62 - GST return for the reporting period
<input type="checkbox"/>	WCB - Annual reporting for WCB
<input type="checkbox"/>	Additional returns / filings (please specify)

### Shareholder Information

Shareholder #1 - Full Name	Social Insurance Number:
% Ownership:	Class of Shares:
Address:	City, Province, Postal Code
Main Phone Number:	Email Address:
Canadian Resident?	Yes No

Shareholder #2 - Full Name	Social Insurance Number:
% Ownership:	Class of Shares:
Address:	City, Province, Postal Code
Main Phone Number:	Email Address:
Canadian Resident?	Yes No

Shareholder #3 - Full Name	Social Insurance Number:
% Ownership:	Class of Shares:
Address:	City, Province, Postal Code
Main Phone Number:	Email Address:
Canadian Resident?	Yes No

Note: If there are more shareholders, please use a separate sheet to record information.

**General Questions**

Has control of the corp. changed during the year?	Yes	No	If yes, specify <sup>1</sup> :
Are total assets of the corp. more than \$10MM?	Yes	No	
Has the corp. purchased capital assets during the year?	Yes	No	If yes, specify <sup>2</sup> :
Has the corp. disposed of capital assets during the year?	Yes	No	If yes, specify <sup>3</sup> :
Is the corp. currently registered for GST?	Yes	No	If yes, filing:    Annually    Quarterly
If filing annually, are you making instalment payments?	Yes	No	If yes, total paid:
Has the corp. received dividends during the year?	Yes	No	If yes, specify <sup>4</sup> :
Is the corp. currently registered for payroll transactions?	Yes	No	If yes, how many employees:
Do you use a software program for accounting?	Yes	No	If yes, provide a copy

**Restricted Expense Log**

If you use a portion of your home as an office or your vehicle to carry out duties of the corporation, a prorated amount may be claimed for corporate tax purposes.

<b>Home Expenses (If applicable)</b>	
Total square footage of home:	Total square footage used for home office:
Utilities:	Insurance:
Maintenance & Repairs:	Mortgage Interest:
Home phone / Cell phone:	Internet / Wi-Fi:
Other Expenses (Description & amount):	

<b>Automobile Expenses (If applicable)</b>	
Year / Make of car:	Purchase price:
Year Purchased:	Total Kilometres driven in year:
Business use %:	Lease payments (If applicable):
Insurance:	Fuel:
Licensing & registration:	Maintenance & repairs:
Other expenses (Description & amount):	

<sup>1</sup> Specify name and percentage of ownership.

<sup>2</sup> Specify type of asset, date purchased and value.

<sup>3</sup> Specify type of asset, date sold and proceed received.

<sup>4</sup> Specify amount and date paid.

**Financial Information Checklist (Provide all that is applicable)**

<ul style="list-style-type: none"> <li>• Bank statements / cancelled cheques / deposit books</li> <li>• Bank reconciliations</li> <li>• GST / PST / WSIB remittance forms</li> <li>• Prior year's tax return</li> <li>• Record of capital gains deductions previously used</li> <li>• All Assessment Notices from federal/provincial gov'ts</li> </ul>	<ul style="list-style-type: none"> <li>• Certificate of Incorporation</li> <li>• Minute Book</li> <li>• Payroll information</li> <li>• Record of investments made for the corporation</li> <li>• List of assets purchased during the year</li> <li>• List of assets sold during the year</li> </ul>
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**Other Comments:**

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**Internal Office Use Only**

Owner / Manager Compensation Structure	
Salary:	Bonus:
Taxable benefits:	Tax-free benefits:
Dividends:	Shareholder loan account management:
RRSP History:	TFSA / RESP / RDSP planning:
Individual income splitting opportunities:	Family trust details:

**NOTICE:**

By submitting this form, you, as the shareholders of the corporation, hereby consent to the collection of your corporate and personal information by Fay Chrisohou Professional Corporation (FCPC). We will use this information for all your corporate tax and accounting business with FCPC. We will keep a record of your corporate and personal information, correspondence or comments in a file specific to your corporation. We will utilize, disclose or retain your information for as long as necessary to fulfill the purposes for which it was collected and as permitted or required by law. We have implemented physical, organizational, contractual and technological security measures to protect your information from loss or theft, unauthorized access, disclosure, copying, use or modification. We will not disclose your information to unauthorized third parties. It is your responsibility to inform us, in a timely manner, of any changes to the information hereby submitted.