

CORPORATE TAX CHECKLIST



CORPORATION NAME		
DATE OF INCORPORATION		
YEAR END DATE		
BUSINESS #		
AB ACCOUNT #		
ADDRESS	Address:	
	City:	Province:
	Postal Code:	
TELEPHONE #		
EMAIL ADDRESS		
SHAREHOLDER NAME(S)		
SHAREHOLDER SIN/BN #		
SHAREHOLDER %		
LAWYER CONTACT	Name:	Phone #:
BANKER CONTACT	Name:	Phone #:

ADDITIONAL INFORMATION

Please specify the principal products or services provided: _____

What type of financial statements do you require (i.e. notice to reader, review, etc.)? _____

Which bookkeeping software (i.e. Quickbooks, Simply, etc.) do you use? _____

Do you currently have a bookkeeper? Can we contact them directly? _____

If so, what is there contact name and phone number? _____

Is this the first year filing a return with the Canada Revenue Agency? Y N

Do you file GST returns for your corporation? Y N

If so, how often do you file GST returns (i.e. monthly, quarterly, annually)? _____

Has a CRA representative authorization form been filed? Please ask us for further information. Y N

Do you have a minute book for your corporation? Please provide. Y N

Meeting Notes (to be completed by RGPC): _____ Date: _____

Shareholder Signature: _____