

S. Kelly & Company Ltd.
 Tax & Accounting Services
 E-mail: Skelly202@shaw.ca
 Phone: 778-406-1633



New Client Interview

Bookkeeping & Accounting Services

Client Name:		Date:			
Company Name:					
Address:					
Main Contact:		Email:		Phone:	
Referred by:					
Interview and Planning Items		Comments			
Nature of the business					
Start date of business					
Annual sales / Estimates	Previous Year \$	Current Year \$			
Is this a Corporation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	INCORP. Date:		
Incorporation Number					
Shareholder information owner %					
Sole proprietor information – Partnership?				Start date:	
Do you require payroll services?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Employees? How many?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Frequency of accounting needs	Monthly: <input type="checkbox"/> QTR: <input type="checkbox"/> Annually:				
Fiscal year end?					



Interview and Planning Items	Yes	No	Comments
Existing Legal or CRA concerns	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Last year filled business taxes T2 or T2125			
Have you had a bookkeeper in the past? If yes, what is the last month or year of services that were completed?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
If you have had a bookkeeper in the past, please explain what you liked about their services and/or what they could have improved upon.			
Presently, are there more than 3 months of backlog for us to complete? If yes, how many months years, explain?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Do you currently have accounting software that you use? What for?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Will you be dropping off your records to us or will we be required to pick up monthly?			
Do you hire contractors? If so, how many currently?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Does the company hold inventories of any kind? If so, please explain.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
If there are inventories, do you count inventory regularly, and if so, how often?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	

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Is the company up to date on GST/HST, Payroll Remittances and WCB Filings?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Do you currently have an accountant who you would like us to work with for special questions and year end preparation and/or taxes, etc.?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
How many bank accounts are there being used for the business? Corporate and/or Personal. Please explain.			
How many credit card accounts are there being used for the business? Corporate and/or Personal. Please explain.			
Is there anyone else who we can contact with questions in order to perform our work ongoing? If yes, please provide contact information here.			
Do you require paper or electronic reports?			
CRA Business Number			
GST / Frequency			
WCB Number / Frequency			
PST Number / Frequency			

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Interview and Planning Items	Comments
Please provide previous accountant contact information if needed.	
Do you have a monthly budget for bookkeeping services? If so, please provide.	
Additional comments or Questions:	

Client Signature:

Date:

Specialist Signature:
S. Kelly & Company Ltd.

Date: