



STERNAT + ASSOCIATES
Chartered Professional Accountants

New Client Profile

Date: _____
Client #: _____
Year end date: _____

Corporation's Legal name: _____
Operating name (if different): _____
Date of incorporation: _____
Address: _____
City: _____ Province: _____ Postal Code: _____
Office Ph: _____ Cell: _____
e-mail: _____
Corporation's Business number: _____

Type of Entity: Not- For-Profit Registered Charity Foundation T2 RCI

Prior year prepared as: Audit Review

Entity's Main Activity: _____

Stmt & letter signing auth (name): _____
Bank signing authority (name): _____

Contact person:
Name: _____
Position: _____
Office Ph: _____ Cell: _____
E-mail: _____

Remittance type:				Filing Frequency			Who is filing?	
	Y	N	Rebate	M	1/4	Y	Client	Firm
GST Registered?	Y	N		M	1/4	Y	Client	Firm
PST Registered?	Y	N		M	1/4	Y	Client	Firm
Payroll ?	Y	N		M	1/4	Y	Client	Firm

Previous Accountant - Take over letter details:
Firm: _____
Name: _____ Phone: _____
Address: _____

Reason for leaving previous accountant: _____
Referred by: _____

OTHER INFORMATION

- Copy of the Articles of Incorporation
- Copy of the Articles of Amendment (if applicable)
- Prior year financial statements (if applicable)
- Prior year Corporate tax return or Registered Charity Return
- Details of share structure and share ownership

Please forward these documents to our office.
Either in person or by our client portal.

Shareholder(s) Name(s):	S.I.N. / Bus #	Share Class	# of shares	Cost per Share
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____