



Outsourced Accounting, Tax Services  
and Business Consulting

YourModernAccountant.ca | 416.934.7744 |

INFO@YourModernAccountant.ca

The member of your business team you didn't  
know you were missing

Business Number  Provincial Corporate Number

Fiscal Year-End  Date of Incorporation

Main Product/Service

Business Address

City  Province  Postal code

### MAIN CONTACT INFO

First & Last Name

Email

SIN  Phone

*If your business has more than one partner, please let your Tax Hero know.*

### ITEMS WE NEED TO GET STARTED

- |   |   |
|---|---|
| <input type="checkbox"/> Articles of Incorporation        | <input type="checkbox"/> Previous year tax files                |
| <input type="checkbox"/> Access to your financial records | <input type="checkbox"/> Final month's business bank statements |
| <input type="checkbox"/> Copy of excel file               | <input type="checkbox"/> Business chequing or savings           |
| <input type="checkbox"/> Online software                  | <input type="checkbox"/> Credit card                            |

*If you are using online software for your financial records, add [info@yourmodernaccountant.ca](mailto:info@yourmodernaccountant.ca)*

If you'd like us to check your CRA business account, file your GST/HST taxes, or be an authorized representative, click the link below and enter in the required information:

[Click This Link to Access the Authorization Form](#)

## ADDITIONAL QUESTIONS

**1. Do you have any other sources of income?** Yes/No

- Employment  
 Rental Income

- Investments (excluding RRSP and TFSA)  
 Other

**2. Do you work from home?** Yes/No

If yes AND this hasn't been accounted for on your financial records, enter in your total home costs (rent or mortgage interest + property taxes + utilities) for the fiscal year here:

**3. Do you use your car for business?** Yes/No

If yes AND this hasn't been accounted for on your financial records, enter in your total car costs (lease or interest costs + insurance + license/registration fees) for the fiscal year here:

**4. Do you collect sales tax on your sales?**

If yes, are you registered for a GST/HST account?

**5. If this is your first year filing corporate taxes AND you were self-employed last year, did you bring any assets into your corporation from your previous business?**

**6. If we are preparing your personal taxes, please provide the following information:**

Marital Status

Canadian Citizen

Date of Birth

Dependants

(YYYY/MM/DD)

**7. Are we preparing T4 slips or T5 slips for your business?**

**8. Are you the sole shareholder of your corporation?** Yes/No

## 9. COVID-RELATED SUPPORT PROGRAMS

Please check off which of the following government relief benefits you received:

- CERB and/or CRB  
 Canada Emergency Rent Subsidy (CERS)  
 Canada Emergency Wage Subsidy (CEWS)  
 Temporary Wage Subsidy (TWS)  
 Canada Emergency Business Account (CEBA)  
 If you received any other benefits from other COVID-related support programs or have any notes to add, please list/add below: