CLIENT INFORMATION (Bus Info) MBC green folder updated ☐ No ☐ Yes Date:

FROM EMP# for BKKP yr☐ TAX yr☐ APPMT☐ No Yes: set up for date:

Legal Name: _____I
Individual ☐ Corporation ☐

Operating Name: _____
Status Card☐

Bus #@ CCRA: Corp/Prov. #:

Phone #:

Contact time(s):

Fax #, etc:

Contact Person/Representative: Phone #:

Head Office Address	Books & Records Address	Mail Address for Tax Notices	Mailing (for us) Address

Legal Type of Business:
If Partnership☐ Proprietorship☐: *Any legal agreement* NO YES Obtained: NO YES
If Incorporation ☐ Non Profit Society ☐ Charity ☐:_____
Obtain Incorporation Records from minute book:
☐Shares Issued / Voting Shareholders ☐Legal Arrangements ☐ List of Directors
☐ Certificate of Incorporation /Registry ☐ Articles of Incorporation / By Laws

FOR OFFICE USE:
☐Partnership *(CIS:client_client)*
☐Incorporation *(CIS:client_T2)*
☐Proprietorship *(CIS:client_client)*
☐Other *(CIS:client_T2 or _T3)*
(if client_client:Complete Personal Interview)

Proprietor/Partner/ Shareholder Name(s):	Shares/ownership % OF	#/$ OF	S.I.N./BNN
1			
2			
3			
4			
5			

Activity of Business:

Tax Year End:

Business Start Date

Name & Address of Company Person
(for Tax Return contact)

WE did Previous Year Bookkeeping & / or taxes - YES☐ NO:
Last Years Books Prepared By: Last Years Taxes Prepared By:
Letter signed for Previous Bookkeeper☐/ Accountant☐/ Shipped date:
Name: Name:
Address: Address:
Contact Phone #: Fax#: Contact Phone #: Fax#:

SIGN ON: INFORMATION CONFIRMED, SERVICE AND ASSIGNMENT AGREEMENT OF PROCEEDS

bookkeeping ❑ consulting ❑ tax preparation ❑ training ❑ year end appointment ❑ Years requested:

We believe the information provided will be accurate to the best of my/our knowledge. We understand any quoted fees for the services do not include interest or administration fees incurred on collection of the aforementioned fee or fees for additional information not available at the time of the interview. Should the fee be unpaid after 2 weeks completion of file, notification by mail and phone will be provided. This assignment will serve as personal guarantee and authorization to collect the fees from any anticipated refunds and/or tax credits from the government may we not settle our account after 3 notifications. I/We; authorize H & R Block & Morinville Business Centre (402829 Alberta Ltd.) to settle the outstanding account with any tax credit or tax refund. We do charge Interest on any outstanding balance in excess of 14 days. It attributed daily at .000658% (24% annually, 2% monthly)

DIRECTOR SIGNED: **DATE:**
I understand that I have authorized the aforementioned services. I realize that I am personally responsible for the account fees being paid in full.
X **SIGNED by** DIRECTOR❑SHAREHOLDER❑ REPRESENTATIVE❑
Print Name: **Date:**
Signatures:

Progress Report on Service request: appmt date: w/