New Client Planner

Private & Confidential

(Please complete for both you and your spouse, if applicable.)

CONTACT INFO

Name	
Age	
Address	
City	
Postal Code	
Email	
Home Phone	
Cell Phone	
Work Phone	
Website	
Spouse's Name	
Spouse's Age	
Spouse's Email	
Spouse's Cell Phone	
Spouse's Work Phone	
Spouse's Website	

PREVIOUS EXPERIENCE

Our professional standards require that we give courtesy and respect to our predecessor. This will also ensure a smooth transition for all parties.

1. Have you ever worked with a Professional Accountant? If so, what firm?

2. What worked and/or didn't work?

3. What is your intention or reason in changing firms?

4. The growth of our firm is based solely on referrals. Who may we thank for your referral?

SHARON PERRY & ASSOCIATES | CPA

YOU, YOUR BUSINESS & YOUR INVESTMENTS

As a Professional Accountant, it is important that we understand you and your investments.

1. Please provide a brief summary of the services you require. (i.e. personal taxes, corporate taxes, financial statements, etc.)

2. What was the last tax year filed with CRA? If you aren't current, what is holding you back from filing?

3. If you have a business, what kind of products or services do you provide? And how many years have you been in business?

4. Do you have a bookkeeper for the business? Who is your bookkeeper?

5. If you have investments, what types do you have? i.e. TFSA, RRSP, RESP, bonds, stocks, rental/income properties, etc.

6. Are your investments self-managed? If not, who is your financial planner/advisor?

7. As a Canadian citizen, each year we are required to report foreign income/property over $100,000. Does this apply to you?

8. Tax laws change frequently for every country. Were you born in another country? If so, are you required to file tax returns in any other country? Or have you looked into your obligation to do so?

9. What do you do when you're not working? i.e. community/volunteer, family, exercise, leisure, hobbies, vacation, etc.

VALUES

These quotes/statements have significant meaning to us. Understanding their meaning to you may promote a better relationship and communication with us.

1. "Time is our biggest currency." Does this resonate with you?

2. We are always one decision away from failing." What does this mean to you and/or your business?

3. My family, business and community are my passion and purpose in life. I truly love what I do as a Chartered Professional Accountant and find it extremely rewarding to give back to the community and those less fortunate. Please share your passion for life, community involvement and/or career.

Would you like to receive our quarterly newsletter? YES ○ NO ○

Thank you for taking the time to complete our client planner form. Once reviewed, we will determine if we have a strong foundation to initiate a valued relationship and can be of service to you. Next steps may include our offering of a complimentary 30-minute consultation, in person and/or by phone, or a heartfelt referral to a fellow associate that will meet your needs.