



SHARON PERRY & ASSOCIATES | CPA

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

My professional standards require that I give courtesy and respect to my predecessor. This will also ensure a smooth transition.

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 my firm is based solely on referrals. Who may I thank for your referral?



YOU, YOUR BUSINESS & YOUR INVESTMENTS

As a Professional Accountant, it is important that I 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.

