



SHARON PERRY & ASSOCIATES | CPA

New Client Planner

PERSONAL CONTACT INFO

Name _____ Age _____

Email _____ Mobile _____

Website _____ Home Phone _____

Address _____

City, Province, Postal Code _____

Partner Name _____ Age _____

Email _____ Mobile _____

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?

YOU & YOUR BUSINESS

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

1. Please provide a brief summary of the services you require. (i.e. corporate taxes, financial statements, tax planning, personal taxes, etc.)
2. What is your corporate year-end date? What was the last corporate tax year filed with CRA? If you aren't current, what is holding you back from filing?
3. What kind of products and/or services do you provide? How many years have you been in business?
4. What are your plans for business growth over the next 1- 5 years? At what rate has your business grown year over year? (i.e. number of employees, revenue %, client base, or NA if first year of business and/or unknown)
5. Do you have a bookkeeper for the business? Who is your bookkeeper? What bookkeeping software do you use?
6. What type of corporate and/or personal investments do you have? (i.e. TFSA, RRSP, RESP, bonds, stocks, rental/income properties, etc.)
7. Are your corporate and/or personal investments self-managed? If not, who is your financial planner/advisor?
8. As a Canadian citizen, each year we are required to report foreign income/property over \$100,000. Does this apply to you or your business?
9. Tax laws change frequently for every country. If born in another country, are you required to file personal tax returns in that country or any other? Or have you looked into your obligation to do so?
10. Describe your company culture, both in the business and in the community.

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? Why?
2. What is your definition of failing and how do you overcome it?
3. Sharon's family, business and community are her passion and purpose in life. She truly loves what she does as a Chartered Professional Accountant and finds it extremely rewarding to give back to the community and those less fortunate. Please share your passion for life, community involvement and/or career.
4. What do you do when you're not working? i.e. community / volunteer, family, exercise, leisure, hobbies, vacation, etc.

Would you like to receive our quarterly newsletter?

YES

NO