

**CLIENT INFORMATION SHEET - SOLE PROPRIETORS**

Name of Business: \_\_\_\_\_

Owned by: \_\_\_\_\_ SIN#: \_\_\_\_\_

Business Address: \_\_\_\_\_

Phone #'s: Bus. \_\_\_\_\_ Home \_\_\_\_\_ Cell \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Business (BIN) #: \_\_\_\_\_ Industry: \_\_\_\_\_

# of Employees: \_\_\_\_\_ Do you use a home office?: yes / no

**What services do you require? (circle all that apply):**

- Accounts Payable
- Accounts Receivable
- Bookkeeping
- HST Returns
- WSIB Returns
- Payroll Preparation
- Payroll Remittances
- Accounting / Financial Statement Preparation
- Bank Reconciliations
- T1 Personal Income Tax Return (if so please also fill out the personal tax form)
- Other (please specify) \_\_\_\_\_

**Do you currently use accounting software?** yes / no

**If yes....** Name of accounting software \_\_\_\_\_  
What version is the software? \_\_\_\_\_ Client ID# \_\_\_\_\_

**Tell us a bit more about your business:**

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