FELTHAM & ASSOCIATES
CHARTERED PROFESSIONAL ACCOUNTANTS

*Professional **Strength**. Personal **Service**. Practical **Solutions**.*

Corporate Client Intake Form

1. General Information

Business Name:	Related Companies:	
Physical Address:		
City:	Province:	Postal code:
Mailing Address:		
City:	Province:	Postal code:
Main Phone:	Fax:	
Website:	CRA Business Number #:	
Contact Name:		
Title:	Email:	
Work Phone:	Cell Phone:	

2. Business Information

Bank:	Time with current Bank:
Types of Accounts:	Year End Date:
Primary Banking Officer:	
Primary Legal Counsel:	
Law Firm of Counsel:	
Current Financial Advisor(s):	
Type of Relationship:	Level of Satisfaction:
Have you informed your previous Accountant/Advisor that you are meeting with us?	
Do you have an outstanding balance with your previous Accountant/Advisor?	

How long have you been in business?
Is the business profitable?
If not, how are you covering operations and cash flow?
What accounting system do you currently use in your business?
Are you happy with your current accounting system? Why or why not? (eg. does it give you information to help manage your business and maximize profits?)

3. Services

How did you learn about us?
Is there a specific reason for which you contacting us?
What do you expect from your accountant/advisor?
What are your most important service issues?
What is your annual accountant/advisor budget?
How often would you like to meet with your accountant/advisor?
Do you expect your accountant/advisor to contact you unilaterally throughout the year?
What is your expected turnaround time for preparation of reports received by our firm?
Please list any other items that you feel strongly about that we have not covered in this questionnaire: