



Rumley & Associates

CHARTERED ACCOUNTANT
PROFESSIONAL CORPORATION

General Corporate Information for New Clients

The following information is required in order to assist us in understanding your business and to provide us the necessary information in order to serve you as our new client. Please feel free to call us if you have any questions.

- Copy of Articles of Incorporation and Certificate.
- Copy of the Shareholders Register outlining shares issued and to whom.
- List of all shareholders (full name) as well as their Social Insurance Number or Business Number as applicable.
- List of Directors and Officers and any other key people in the organization.
- Copy of Shareholder Agreement (if applicable).
- Copy of any Franchise Agreements or any other significant agreements.
- Name and phone number of bookkeeper.
- Name and phone number of previous accountant (if applicable).
- Copy of previous year's Financial Statements, unless this is the first year of incorporation.
- Copy of the last three year's Corporate Tax returns and copies of Notice of Assessments (Federal and Provincial as applicable).
- Mailing address and physical address, if different.
- Business telephone and fax numbers, and e-mail address.

PRINT FORM