

We appreciate your interest in working with Belliveau Veinotte Inc! Please complete the form below to help us learn more about you so we can determine how best to meet your accounting needs.

Contact Details:

First Name _____ Last Name _____

Email _____ Phone # _____

How did you hear about us?

Who was your previous accountant?

Is there a reason you are leaving your previous accountant?

Are you registered for CRA My Account ? (Note: in order to service our clients effectively, we will need to be set up as a representative via My Account)

Please check the sources of income/ deductions that you generally have to report on your tax return.

- ☐ Employment income (T4)
- ☐ CPP
- ☐ OAS
- ☐ RIF
- ☐ Registered investments
- ☐ Sale of property

- ☐ Self-employed business
- ☐ Rental property
- ☐ Employment expenses (T2200 required)
- ☐ Medical expenses
- ☐ Donations
- ☐ RRSP contributions

For self-employed or rental activity - Do you track this activity in a summary, accounting software or provide receipts?

Are you registered for HST? Do you require remittance filed?

Do you use a broker for your investments? If so, what is your broker's contact information?

Do you have self-directed portfolio investments? If so, do you have access to transaction details?

Do you have any urgent filing requirements? If so, please provide deadline.

Are you up to date on all CRA reporting requirements?

Additional Notes:

(Please provide any further details that you think would be important for us to know below)

Please return by mail to 11 Dominion St. Bridgewater, NS B4V 2J6, in person or by email to bridgewater@bvca.ca