COAST MOUNTAIN ACCOUNTING

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

6-1366 Aster Street, Pemberton, BC | Phone 778-887-4664 | coastmountainaccounting.com

New Business Onboarding Questionnaire

Please complete the fields below (click a field and type, or choose from the drop-down lists), save the file, and email it back to us. Fields marked with * are required on our online form.

How to return this form

Please email the completed form to info@coastmountainaccounting.com. Questions? Call 778-887-4664

A Bit About Your Business...

Business Name *

Client Name *

Street Address *

City *

Province/Territory *

British Columbia

Postal Code *

Mailing Address (if different)

Phone *

Email *

Business Industry *

Business Structure *

Select...

Fiscal Year Period *

Select...

What was the last tax year filed? *

Select...

GST Registered? *

Select...

PST Registered? *

Select...

Which software package are you using? *

Select...

If other, please specify.

Annual sales turnover (approx) *

Select...

How do you prepare your invoices? *

What business accounts do you have? *

- [ ] Chequing
- [ ] Savings
- [ ] Credit Cards
- [ ] PayPal
- [ ] Square
- [ ] Stripe
- [ ] Bank Loans
- [ ] Leases

How do you pay your bills? *

- [ ] Online Bill Pay
- [ ] Credit Card
- [ ] PayPal

Do you have Payroll? *

Select...

Number of employees? *

Select...

Do you have inventory? *

Select...

Additional Details / Message

Your information is kept confidential and used only to prepare your return.

When finished, save this file and email it to info@coastmountainaccounting.com.

Please do not include your SIN, business or CRA account numbers, or banking details in this file. Call us at 778-887-4664 if we need them.