

Y&Y; Tax and Finance Inc.

Corporation Intake Form (T2 – Canada)

1. Corporation Information

Legal Corporation Name:	
Trade Name (if different):	
Business Number (BN):	
Date of Incorporation:	
Jurisdiction (Federal / Provincial):	
Fiscal Year-End (MM/DD):	
Nature of Business / NAICS:	

2. Registered Office & Contact Details

Registered Address:	
Mailing Address (if different):	
City / Province / Postal Code:	
Business Phone:	
Business Email:	
Website:	

3. Directors & Shareholders

Full Legal Name (as per CRA records)	SIN	Ownership %	Director (Y/N)	Shareholder (Y/N)

Full Legal Name (as per CRA records)	SIN	Ownership %	Director (Y/N)	Shareholder (Y/N)

4. Accounting & Financial Information

Accounting Method (Cash / Accrual):	
Bookkeeping Software (QuickBooks / Excel / Other):	
Who prepared the bookkeeping?:	
Financial statements provided? (Yes / No):	

5. Income Information

Type of Income (Business / Professional / Rental / Investment):	
Approximate Gross Revenue for the Year:	

6. Expenses (summary)

Office, Advertising, Vehicle, Home Office, Professional Fees, Insurance, Other:	
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7. GST/HST Information

Registered for GST/HST? (Yes / No):	
GST/HST Filing Frequency (Monthly / Quarterly / Annual):	
Method (Regular / Quick):	
Outstanding GST/HST balance? (Yes / No):	

8. Payroll Information (if applicable)

Payroll Account Number (RP):	
Employees during the year? (Yes / No):	
T4 / T4A prepared? (Yes / No):	

9. Shareholder Loans & Dividends

Any shareholder loans? (Yes / No):	
Any dividends paid? (Yes / No):	
Amount:	

10. Assets & Liabilities

Assets purchased during the year (vehicles, equipment, etc.):	
Loans / Lines of Credit:	

11. CRA Authorization

CRA My Business Account registered? (Yes / No):	
Authorization granted to Y&Y Tax and Finance Inc.? (Yes / No):	