

**2023 NON-INDIVIDUAL
CLIENT INFORMATION FORM**



Required Information

Entity:		<i>Corporate, Non-Profit, Other, Partnership, Trust & Estate, Trust Inter-Vivos</i>	
Name:		BN# / Acct#:	
Mailing Name: <i>(replaces above Name on Invoices & Statements)</i>			
Salutation: <i>(name of main contact Individual)</i>			
Partner:		Industry: <i>(AG, EST, FIN/INSUR, GOV, INV, MFG, NPO, PERC, PHARM, PREC, PRO, RENT, REST, RET, SERV, TRADE, Trust)</i>	
Manager:			
Mailing Address:		Physical Address: <i>(if different)</i>	
Addressee Name: <i>(name for postal purposes; ie. Executor, etc)</i>			
Contact Numbers:	Mobile:	Home:	
	Work:	Other:	
E-Mail(s):			

NTR Client	Review Client	Audit Client	Tax Consulting	T2 Returns
T3 Returns	T4 slips	T5 slips	Sales Tax Return	HST Filing Freq:

Tax Yearend:	Client Type:
Client From: <i>(MM/DD/YYYY)</i> <i>current date used if none specified</i>	Client Sub Type: <i>see iFirm for Client Sub Type Category list</i>

Invoice & Statements:	Email	Mail
Billing Group:	New	Existing
Contact Group:	New	Existing
Notes:		

CLIENT TYPE

- 11 - Agriculture, Forestry, Fishing and Hunting
- 21 - Mining, quarrying, and oil and gas extraction
- 22 - Utilities
- 23 - Construction
- 31-33 - Manufacturing
- 41 - Wholesale Trade
- 44-45 - Retail Trade
- 48-49 - Transportation and Warehousing
- 51 - Information and Cultural Industries
- 52 - Finance and Insurance
- 53 - Real Estate and Rental and Leasing
- 54 - Professional, Scientific and Technical Services
- 55 - Management of Companies and Enterprises
- 56 - Administrative and Support, Waste Management and Remediation Services
- 61 - Educational Services
- 62 - Health Care and Social Assistance
- 71 - Arts, Entertainment and Recreation
- 72 - Accommodation and Food Services
- 81 - Other Services (except Public Administration)

Optional Information

Accounting Software:	
Bookkeeper Name:	
Separate Portal Access?	Yes No
Bookkeeper Email:	