



SUM Bookkeeping & Office Services
Business Client Profile



Client _____ Date: _____

Address: _____ Tel: _____

_____ Fax: _____

_____ Cell: _____

Email: _____ WEB: _____

ORGANIZATION: Proprietorship Partnership Incorporated Society

WCB ACCT: _____ GST #: _____ PST #: _____

Main Product or Services _____

Shareholders	Position	Contact Number
_____	_____	_____
_____	_____	_____
_____	_____	_____

ACCOUNTANT

SOLICITOR

Name _____

Name _____

Address _____

Address _____

Phone _____

Phone _____

Fax _____

Fax _____

Contact _____

Contact _____

SERVICES TO REVIEW

- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Payroll, Government Reporting
- WCB
- GST, PST
- Other _____

- Accounting Software**
- Sage 50

 - Sage One

 - Other _____

- Other Services**
- Office Administration
 - Office Organization
 - Data Entry
 - Document Preparation
 - Brochures
 - Personal / Business Taxes (T1)