



### Client Discovery Form

CLIENT INFORMATION	
Date of initial contact:	Today's date:
Referred by:	
Contact name:	
Company name (s)	
Address:	
Phone number:	
Email:	
Website:	

PART I	
Business entity type: (specify if more than one company)	<input type="checkbox"/> Sole proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation
How did you hear about us?	<input type="checkbox"/> Online research <input type="checkbox"/> Walk in <input type="checkbox"/> Referred by _____ <input type="checkbox"/> Other: _____
Tell us about your business	Main business activity _____  In operation for ____ years. How many employees? ____ Contractors? ____
What are the primary issues you would like to address?	
Describe your ideal bookkeeping services.	
How many hours per month are you currently spending on bookkeeping?	
Do you currently have a bookkeeper or an administrative assistant?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you planning to sell or grow the business?	Sell <input type="checkbox"/> Yes <input type="checkbox"/> No Grow <input type="checkbox"/> Yes <input type="checkbox"/> No



What are your short term (1- 5 years) goals for your business?	
What are your long term (5+ years) goals for your business?	

**PART II**

<b>Today's Date:</b>	
Do you need remote access to your accounting software?	( ) Yes ( ) No
Which software are you currently using?	( ) QuickBooks Desktop ( ) QuickBooks Online ( ) Sage 50 ( ) Other: _____
Are you satisfied with it?	( ) Yes ( ) No  If NO, tell us why? _____
How do you organize your accounting documents (i.e. Bank statements, credit card statements, credit card receipts, deposits, etc.)?	
Do you make notes on them?	( ) Yes ( ) No
What is your fiscal year-end date?	
What is your business number?	
What is your GST filing frequency?	( ) Monthly ( ) Quarterly ( ) Annually ( ) N/A
What is your PST filing frequency?	( ) Monthly ( ) Semi-annually ( ) Annually ( ) N/A
What is your payroll remittance frequency?	( ) Monthly ( ) Quarterly ( ) N/A
Do you have to pay tax installments?	( ) GST Frequency: _____ ( ) Corporate Frequency: _____ ( ) N/A
Which items would you like support with: What do you <b>HAVE TO</b> do?	<b>HAVE TO:</b> ( ) Issue invoices Estimated number of invoices per month _____  ( ) Enter business expenses





	<input type="checkbox"/> Have a valid vision and mission statement for my business <input type="checkbox"/> Be able to take advantage of other investment opportunities <input type="checkbox"/> Become a public company
Please specify other items you would like support with that are not listed above.	
How do your customers pay for products/services?	<input type="checkbox"/> Cheque <input type="checkbox"/> E-mail – money transfer <input type="checkbox"/> Cash <input type="checkbox"/> Credit card <input type="checkbox"/> PayPal <input type="checkbox"/> Others Specify: _____
How do you pay for your business expenses?	<input type="checkbox"/> Cheque <input type="checkbox"/> E-mail – money transfer <input type="checkbox"/> Cash <input type="checkbox"/> Credit card <input type="checkbox"/> PayPal <input type="checkbox"/> Others Specify: _____
Describe your current situation with the government with regard to GST, PST, corporate tax, WCB and payroll remittances. For example: GST file is up to date, income tax was submitted on time, etc.  Also, is there a Tax (corporate tax filing, corporate tax remittance, payroll remittance, GST/PST, WCB) deadline coming up or past due?	



## G. SYNERGY'S BACKGROUND

### Who we are

- Managerial bookkeeping & accounting company since 2002.
- The owner is a MBA, CGA, CPA (Chartered Professional Accountant) with many years of experience.
- Member of North Vancouver Chamber, Greater Vancouver Board of Trade and a QuickBooks Platinum ProAdvisor.
- Team of CPA and Professional Bookkeepers.

### Who we work with

- Startup businesses
- Growing or established businesses
- Bookkeepers & accountants

### Why G. Synergy Books?

- We adhere to the highest industry standards of accounting practices in Canada.
- We use strategic bookkeeping that avoids incidents of fraud and double entries.
- We offer paperless processing to reduce the amount of paper that is used, have a better track of income and expenses, and facilitate audits.