

ASAP

Bookkeeping & Services

O/A 2373636 AB LTD

Company Intake Form

Name of Company: _____

Type of Company: Sole Proprietor Limited Company

Contact Name: _____

Phone Number: _____

Address: _____

Email Address: _____

GST Number: _____ Access Code: _____

GST Remitting Period: Quarterly Yearly

Year End Deadline: _____

Shareholder Name: _____

Shareholder SIN: _____

Shareholder Birthday: _____

Shareholder Business # _____

Business Use of Home:

Total Square Footage of Home: _____ Total Square Footage Used for Business: _____

To be reconciled:

Name of Bank	Type of Account	
_____	_____	Included
_____	_____	Included
_____	_____	Included
_____	_____	\$25.00
_____	_____	\$25.00
_____	_____	\$25.00

asapclients@gmail.com

780-779-0523

Unit 2, 5016 50 Avenue,
Box 1535
Whitecourt Alberta
T7S 1P4

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Packages

- Package A \$135/Month
 - Basic Bookkeeping - Recording monthly expenses & income - Statement Balancing
- Package B \$175/Month
 - Basic Bookkeeping - Recording monthly expenses & income - Statement Balancing - Payroll up to 2 employees - Calculating all Receiver General Remittances
- Package C \$200/Month
 - Basic Bookkeeping - Recording monthly expenses & income - Statement Balancing - Payroll up to 2 employees - Calculating all Receiver General Remittances - Paying all Receiver General Remittances - Filing annual WCB Returns

Additional Services

- Year End Financial Statements Preparation
- T4 &/or T5 Preparation
- Personal Income Tax Preparation

Banking Login Information

Username

Password

Business Chequing Account
Business Saving Account
Business Credit Card

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Disclaimer

During any length of this Agreement, the Bookkeeper shall serve the client and reform any and all services in accounting and tax matters as the client requires in connection with the client business including the preparation of accounting statements, tax reports and returns. The Bookkeeper will also provide supervisory and advisory services to the client when requested. Any expenses submitted are considered business unless otherwise stated by the business owner in writing & need to be submitted in a timeline of one week per month of expenses. All bookkeeping services are unaudited. The Bookkeeper shall bill the client on a regular basis for services rendered which bills will be due & payable upon receipt.

.....
Print Name

.....
Signature

.....
Date

Office Use Only

- | | |
|---|---|
| <input type="checkbox"/> Create Google Tasks | <input type="checkbox"/> Create Filing Folders |
| <input type="checkbox"/> Create Next Month Folder | <input type="checkbox"/> Add to Payroll List |
| <input type="checkbox"/> Add to ASAP Company File | <input type="checkbox"/> Add as ASAP Customer in Sage |
| <input type="checkbox"/> Create & Share Sage Company File | <input type="checkbox"/> Create Google Drive Folder |
| <input type="checkbox"/> Add Contact to Phone | <input type="checkbox"/> Create Gmail Folder |
| <input type="checkbox"/> BANKING INFORMATION IN BOOK | <input type="checkbox"/> Retainer |

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