

**2024 NON-INDIVIDUAL  
CLIENT INFORMATION FORM**



**Required Information**

Entity:		<i>Corporate, Non-Profit, Other, Partnership, Trust &amp; Estate, Trust Inter-Vivos</i>	
Name:		BN# / Acct#:	
Mailing Name: <i>(replaces above Name on Invoices &amp; Statements)</i>			
Salutation: <i>(name of main contact Individual)</i>			
Partner:		Industry: <i>(AG, EST, FIN/INSUR, GOV, INV, MFG, NPO, PREC, 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	<p><b>CLIENT TYPE</b></p> <ul style="list-style-type: none"> <li>11 - Agriculture, Forestry, Fishing and Hunting</li> <li>21 - Mining, quarrying, and oil and gas extraction</li> <li>22 - Utilities</li> <li>23 - Construction</li> <li>31-33 - Manufacturing</li> <li>41 - Wholesale Trade</li> <li>44-45 - Retail Trade</li> <li>48-49 - Transportation and Warehousing</li> <li>51 - Information and Cultural Industries</li> <li>52 - Finance and Insurance</li> <li>53 - Real Estate and Rental and Leasing</li> <li>54 - Professional, Scientific and Technical Services</li> <li>55 - Management of Companies and Enterprises</li> <li>56 - Administrative and Support, Waste Management and Remediation Services</li> <li>61 - Educational Services</li> <li>62 - Health Care and Social Assistance</li> <li>71 - Arts, Entertainment and Recreation</li> <li>72 - Accommodation and Food Services</li> <li>81 - Other Services (except Public Administration)</li> <li>91 - Public Administration</li> </ul>
Billing Group:		New Existing	
Contact Group:		New Existing	
Notes:			

**Optional Information**

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