



SECTION 1 — CLIENT INFORMATION

Client Name			
Corporation Legal Name			
Business Number (BN)			
Fiscal Year Start		Fiscal Year End	
Primary Contact Email			
Primary Contact Phone			

SECTION 2 — REQUIRED CORPORATE DOCUMENTS

Required Document	Attached	Will Send Separately	Notes
Bank statements — first day of fiscal year to December 31	<input type="checkbox"/>	<input type="checkbox"/>	
Credit card statements for Jan 1 – Dec 31 (PDF & Excel preferred)	<input type="checkbox"/>	<input type="checkbox"/>	
Details of expenses paid personally by directors for the corporation	<input type="checkbox"/>	<input type="checkbox"/>	
Invoices for any asset purchases	<input type="checkbox"/>	<input type="checkbox"/>	
Certificate of Incorporation	<input type="checkbox"/>	<input type="checkbox"/>	



SECTION 3 — DIRECTOR INFORMATION

Director Full Legal Name	SIN Number	Profit Share (%)	Role (optional)

SECTION 4 — DIRECTOR PAID EXPENSES

Note:

List any business expenses paid personally by a director on behalf of the corporation.
Please attach all relevant receipts and invoices when submitting this checklist.

Director Name	Expense Description	Date	Amount (\$)



SECTION 5 — ADDITIONAL NOTES / CORPORATE INFORMATION

Document Submission:

Please email all supporting documents to: accounting@abni.ca or canimmagadda@gmail.com

Ensure all documents listed in the checklist are attached when submitting your information.

Important Disclaimer:

This checklist covers the most common income sources, deductions, and tax credits.

Every individual's tax situation is unique. If you have questions or additional items

to discuss, please contact our office or email accounting@abni.ca before submitting.

Thank you for choosing ABNI Financial Services.

Please authorize ABNI Financial Services as your CRA Level 2 representative. Business Number: 725748826