

CORPORATE TAX INTAKE

FORM GA-15 · ONE PER CORPORATION, EACH FISCAL YEAR

FISCAL YEAR-END THIS FORM COVERS

DATE COMPLETED

01 THE CORPORATION

LEGAL NAME

BUSINESS NUMBER (BN)

DATE OF INCORPORATION

OPERATING NAME, IF DIFFERENT

CORPORATION NUMBER

HEAD OFFICE STREET ADDRESS

UNIT / SUITE

CITY

PROVINCE

POSTAL CODE

INCORPORATED UNDER

☐ Ontario☐ Federal (CBCA)☐ Other

MAILING ADDRESS, IF DIFFERENT

☐ New client☐ Returning client**02 MAIN CONTACT**

The person we go to with questions

NAME

ROLE

PHONE

EMAIL

03 DIRECTORS & SHAREHOLDERS

Every director, and anyone owning 10% or more of any class

FULL NAME	DIRECTOR	% OF SHARES	SHARE CLASS	SIN – OR BN IF A COMPANY
	☐			
	☐			
	☐			
	☐			

The CRA asks for the SIN or business number of each shareholder with 10% or more. Because of that, send this form back through the upload page, never by email.

04 ABOUT THE CORPORATION

THESE DECIDE WHICH SCHEDULES AND RATES APPLY – ANSWER FOR THE YEAR ABOVE	YES	NO
Is it controlled by Canadian residents, with no shares traded on a stock exchange?	☐	☐
Does a shareholder, or someone related to one, own or control another corporation? (the two may have to share the small business deduction)	☐	☐
Does it have an office, staff or a place of business outside Ontario?	☐	☐
Is this its first fiscal year?	☐	☐
Is this its last year – winding up, dissolving or amalgamating?	☐	☐
Did it employ more than five people full-time all year? (matters when most of its income is rent or investments)	☐	☐

05 ACCOUNTS WITH THE CRA

☐ GST/HST account (RT)
 ☐ Payroll account (RP)
 ☐ Other

	YES	NO
Did it pay corporate tax instalments during the year?	☐	☐
Is it registered for CRA My Business Account?	☐	☐

IF INSTALMENTS WERE PAID – TOTAL FOR THE YEAR

06 YOUR RECORDS

What you can send us for the year

- ☐ Financial statements prepared by another firm
- ☐ A trial balance and general ledger from bookkeeping software – which software?
- ☐ Greywood Advisory keeps the corporation's books
- ☐ Bank statements and receipts – the books aren't kept yet (bookkeeping is quoted separately)

What we do with them. We prepare the T2 from the corporation's records. We don't audit or verify them, and we don't prepare audited, reviewed or compiled financial statements – Greywood Advisory is not a licensed public accounting firm. If a bank, lender or shareholder needs one of those, it has to come from a licensed firm, and we'll tell you if that applies.

CORPORATE TAX INTAKE

FORM GA-15 · THE YEAR & AUTHORIZATION

07 WHAT HAPPENED THIS YEAR

Check everything that applies — we'll ask for the detail

- | | |
|---|--|
| ☐ Bought equipment, vehicles or other assets | ☐ Sold or scrapped assets |
| ☐ A company vehicle also used personally | ☐ Paid salary or bonuses to shareholders (T4) |
| ☐ Paid dividends (T5) | ☐ Money owed between the company and a shareholder |
| ☐ Dealings with related people or companies | ☐ Shares issued, sold or redeemed, or directors changed |
| ☐ Interest, dividends or investment gains | ☐ Rental income |
| ☐ Government grants, subsidies or loans | ☐ Foreign property over \$100,000 (T1135) |
| ☐ Research or development work (SR&ED) | ☐ A loss this year, or losses from earlier years |
| ☐ Other <input type="text"/> | |

08 PRIOR YEARS & THE CRA

WHO PREPARED LAST YEAR'S T2

ANY YEARS STILL UNFILED

YES NO

Is a CRA review, audit or letter outstanding?

☐ ☐**09 ANYTHING ELSE WE SHOULD KNOW****10 AUTHORIZATION & SIGNATURE**

The information on this form is true, correct and complete to the best of my knowledge. As a director or authorized officer, I authorize Greywood Advisory to prepare the corporation's T2 return from the records it provides, and to file it electronically with the Canada Revenue Agency once the corporation has approved it. I understand that the corporation's information is used only to prepare and file this return, is stored encrypted, is seen only by the person preparing it, and is kept for six years in line with CRA requirements. The CRA's electronic filing authorization (Form T183CORP) is signed separately for each return.

SIGNATURE — DIRECTOR OR AUTHORIZED OFFICER

DATE

PRINTED NAME

TITLE