We're Not Your Ordinary Pencil Pushers

Doing Business With Us

On behalf of the team at Raincoast, we thank you for your consideration in engaging our services. We have learned through past experience that both parties need to be in agreement to have a successful relationship. In order to evaluate the level and types of services you require, we have designed some relevant questionnaires to aid our analysis and determination as to your needs and wants; and to our mutual compatibility. Consider us your Financial Physician! Like your doctor, the more we know about you, the better we can serve you.

This is not a test, so there are no right or wrong answers. We are simply trying to determine if the unique make up of Raincoast and the goals we set to accomplish for our customers, is a match with your requirements. Not all prospective relationships fit the profile that enables us to provide the services required. This Questionnaire and subsequent initial interview are two of the tools we use to better determine the potential of a positive relationship. In as much as we are interviewing you as to your qualifications, we highly recommend that you interview us. Over the years, we have come to accept that although Raincoast's approach to accounting, tax and advisory services is unique, we are not the best solution for all prospects. Long-term value is only maximized when the customers' wants, needs, personality, and financial condition synergistically connects with ours.

We do not price our series by the hour. We believe that the true value is determined by each party. No two relationships are equivalent, and accordingly no two engagements will have the same price and terms. Accordingly, comparison between your needs and wants with those of your acquaintances generally does not produce valid information. And in as much as your relationship is confidential between you and Raincoast, we cannot discuss the terms and conditions of your friends and acquaintances that may happen to have relationships with Raincoast also.

We generally require a retainer to be applied to the financial agreement between our firm and our customers. However, since we provide a complete service satisfaction guarantee, we will gladly refund your prepayment should you unilaterally determine that we have not provided the services agreed to in our service agreement.

In conclusion, we invite you to complete the questionnaire. If you have an interview scheduled, please submit the questionnaire at a minimum of 3 days prior to the interview date. If you do not have an interview scheduled, we will contact you within 3 days of receiving your questionnaire.

Please know that any information disclosed to our office is confidential. If you have any questions, please feel free to contact us any time. We look forward to meeting you personally very soon.

Raincoast
Business Advisors Inc.

*Required Field

PROSPECTIVE INDIVIDUAL CLIENT QUESTIONNAIRE

Background- Personal Information

*Last Name: ____________ *First Name: ____________ Middle Initial: ______

*Street Address: ____________

*City: ____________ *Province: ______ *Postal Code: ____________

Social Insurance #: ____________ Birth Place: ____________ Date of Birth (mm/dd/yyyy): ____________

*Home Phone: ____________ *Work Phone: ____________ *Cell Phone: ____________

*Email: ____________ Fax Number: ____________

Employer: ____________ Title: ____________ Length of Employment: ______

Important fringe benefits: ____________

How long have you lived in the Lower Mainland?

Where were you raised?

What University did you attend?

University location?

Major(s)?

Degrees granted?

Professional affiliations?

Tradesman Qualifications?

Volunteer activities?

Charities supported?

Preferred hobbies?

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PROSPECTIVE INDIVIDUAL CLIENT QUESTIONNAIRE

Background- Spouse/Partner/Family Information

Spouse Last Name: ______________________ First Name: ____________________ Middle Initial: ____

Social Insurance #: ______________ Birth Place: _____________ Date of Birth (mm/dd/yyyy): ____________

Employer: _______________________ Title: ________________ Length of Employment: __________

Important fringe benefits: ____

Child(ren) Full Name(s)/Please list below	Child(ren) Age/Date of Birth

Background- Finances

Primary Bank: ____ Time with Bank: ____________

Type(s) of Account(s): ____

Current Financial Advisor(s)

Name(s): ___________________ Relationship: __________________ Level of Satisfaction: __________

Name(s): ___________________ Relationship: __________________ Level of Satisfaction: __________

Name(s): ___________________ Relationship: __________________ Level of Satisfaction: __________

Current Fee Relationship(s) with Advisor(s): ______________________________

Do you think the fee(s) charged were fair? ______________________________

If not, why not?

Have you informed your previous accountant/advisor that you are meeting with us? __________________

Do you have a balance with your previous accountant/advisor? ____________________________

Do you invest? ____

What kind of investments do you have/make? (ie. Stock, Real Estate, RRSP, etc.)

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How would you rate your level of risk with investments? ______

Do you have an established Estate Plan? ______

Do you have a Trust? ______

Is your Will current? ______

Who is your Legal Advisor? ______

Service Related Questions:

Who referred you or how did you hear about our firm? ______

Was a partner recommended, and if yes, whom? ______

Why did you initiate this contact? ______

Please list your most important service issues: ______

What are your expectations of a CPA/advisor? ______

Please state how you would define a "successful" relationship: ______

What is your annual advisor budget? ______

How often would you like to meet with your accountant/advisor? ______

Do you expect your accountant/advisor to contact you unilaterally throughout the year? ______

On a scale of 1 to 10, 1 being absolutely risk averse,
10 being high risk taking, rate your risk comfort level relative to tax avoidance options: ______

Why? ______

How quickly do you expect a "returned" phone call or email? ______

What is your expected turn-around time for preparation of reports received by this office? ______

Would you like to receive email based tax and financial related information? ______

Are you comfortable with electronic communication?______

Do you have internet access? ______

How often do you access the internet? ______

How do you feel about being contacted
by a firm member other than your initial partner contact? ______

Please list any other service related or other items that you feel strongly about that we have not covered in this survey:

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