



ATBS Canada  
Toll free 1-877-878-5829  
Toll free fax 1-877-878-5830  
Email [info@truktax.com](mailto:info@truktax.com)

### Setup Form

Name: \_\_\_\_\_ (normally called) \_\_\_\_\_ Date: \_\_\_\_\_

Carrier: \_\_\_\_\_ Since: month \_\_\_\_\_ year \_\_\_\_\_

**Contact info:**

**Mailing Address:**

Street \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Home phone \_\_\_\_\_ Check if preferred contact # \_\_\_\_\_

Cell phone \_\_\_\_\_ Check if preferred contact # \_\_\_\_\_

Email address \_\_\_\_\_ Check if preferred contact method \_\_\_\_\_

Main contact:  Self  Spouse \_\_\_\_\_  Other \_\_\_\_\_  
Print name Print name

**Payment method (please check one):**

POST DATED CHEQUES Months attached (min 6) \_\_\_\_\_

MASTERCARD  VISA  AMERICAN EXPRESS  
Card# \_\_\_\_\_ Exp mth \_\_\_\_\_ year \_\_\_\_\_

Name on card (print) \_\_\_\_\_ Signature \_\_\_\_\_

**Services approved for charge (check):**

Reality Check \$199.00 plus GST  Platinum Program ( as specified below)

**Current Year Platinum Program fees:**

1. All payments charged first of the month.
2. Past due full amounts owing must be paid before services completed.
3. Sole Proprietor Fees include: One-time, non-refundable setup fee \$129.00 plus GST, twelve monthly payments of \$129.00 plus GST starting Jan ending Dec. Corporations and Partnerships have slightly higher fees, contact us for details. The Annual fee is 12 times the monthly payment. If you start the service mid year catch-up fees apply, call for details.
4. Prior years will be dealt with on an individual basis, please contact us to discuss.

**Business Information**

Years as an Owner Operator \_\_\_\_\_ Type of Business Entity (check one):

Sole Proprietor  Partnership  Corporation

Do you presently use the services of (check all that apply):

Bookkeeper       Accounting Firm       Tax preparer       Financial Advisor

Are you up to date on all Annual Income Tax filings:  Yes  No Last year filed: \_\_\_\_\_

Are you registered for GST:  Yes  No If yes, BN#: \_\_\_\_\_

Do you file quarterly or annually? \_\_\_\_\_

Are you up to date on all GST filings:  Yes  No Last year of filed: \_\_\_\_\_

Truck model \_\_\_\_\_ Year \_\_\_\_\_ Circle: Leased Owned

Engine type \_\_\_\_\_ Horsepower \_\_\_\_\_ Total odometer \_\_\_\_\_ (circle) miles kms

**Info for determining your goals and objectives for using ATBS Canada:**

**Rank in priority order the items below using 1 to 6, 1 first priority, 6 last priority:**

- \_\_\_\_\_ I need a bookkeeper to gather and enter all my receipts
- \_\_\_\_\_ I need reports telling me how I am doing
- \_\_\_\_\_ I need to understand my Cashflow
- \_\_\_\_\_ I need my taxes or GST brought up to date
- \_\_\_\_\_ I need to figure out where my business is going
- \_\_\_\_\_ I need to get my finances under control with advice      Circle: Personal      Business

**Please expand and be specific on your number 1 and 2 items above so we can serve you better:** \_\_\_\_\_

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**Can we send you reports and info by email? Circle: Yes No Email :** \_\_\_\_\_

**Completed by (print)** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_