Gondaliya CPA
Your Growth Partner

Virtual Onboarding Checklist

Gondaliya CPA Professional Corporation · Registered Ontario CPA Firm

Twelve things to have ready before the first call

For Ontario businesses moving to a remote accountant. Current to 6 November 2026.

- [ ] **Know which cloud software you already use**
  QuickBooks Online or Xero shortens onboarding most.
- [ ] **List every bank and credit card account**
  Each one needs a feed connected before books can run.
- [ ] **Check whether your bank feeds are live**
  A disconnected feed is the commonest onboarding delay.
- [ ] **Gather the last filed tax return**
  Opening balances are taken from it.
- [ ] **Gather the last year-end financial statements**
  They set the starting point for the new file.
- [ ] **Note whether you run payroll, and on what system**
  Frequency and headcount both affect the work.
- [ ] **Confirm your GST/HST registration and filing period**
  A separate return on its own schedule.
- [ ] **Decide how receipts will reach us**
  A capture tool beats emailing photographs.
- [ ] **Say how far behind the books are, honestly**
  Backlog at the start is the biggest fee driver.
- [ ] **Name who in your business we should deal with**
  One point of contact keeps questions moving.
- [ ] **Agree what you get back, and how often**
  Monthly, quarterly, or at year-end.
- [ ] **Agree the fee before any work begins**
  Fixed and annual, shown before tax.

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