



Unified Enterprise Survey - Annual

1999 Survey of Service Industries: Accounting and Bookkeeping

Collected under the authority of the *Statistics Act*, Revised Statutes of Canada, 1985, Chapter S19.

Completion of this questionnaire is a legal requirement under this Act.

This document is confidential when completed.

Si vous préférez recevoir ce questionnaire en français, veuillez appeler au numéro de téléphone indiqué dans la boîte ombragée ci-dessous.

Correct pre-printed information if necessary using the corresponding boxes below:

0001	Legal name	0004	Number and street		
0002	Business name	0005	City	0006	Province or State
0003	C/o	0053	Country	0007	Postal code
0008	First name of contact	0028	Last name of contact		
0052	Please report for:	0010	Language preference 1 <input type="radio"/> English 2 <input type="radio"/> French		

A - Introduction

Survey Purpose

This survey collects the financial and operating data needed to produce statistics concerning your industry. These data will be aggregated with information from other sources to produce official estimates of national and provincial economic production in Canada, as well as official estimates of activity by industry. These estimates are used by government for national and regional programs and policy planning as well as by the private sector for industry performance measurement and market development.

Coverage


Please complete this questionnaire for the business unit described in the pre-printed area above. "Business unit" refers to the operation(s) described in the pre-printed area. Report only for those operations located in Canada.

Confidentiality

Statistics Canada is prohibited by law from publishing any statistics which would divulge information obtained from this survey that relates to any identifiable business. **The data reported on this questionnaire will be treated in strict confidence**, used for statistical purposes and published in aggregate form only. The confidentiality provisions of the *Statistics Act* are not affected by either the *Access to Information Act* or any other legislation.

Please return the completed questionnaire(s) in the enclosed envelope **within 30 days** of receipt. However, if you wish to send the questionnaire(s) by facsimile, please consult the **Reporting Instructions** in this section. Thank you.

**If you need further information or help,
please call 1 888 881-3666.**

Name of the primary person completing this questionnaire:			
0026	<input type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Miss <input type="radio"/> Ms.	0013	0054
First name		Last name	
Title: 0014			
Telephone number: 0017	Extension: 0027	Fax number: 0016	Date completed: YYYY MM DD
Signature: 			0015
I certify that the information contained herein is complete and correct to the best of my knowledge.			

Reporting Period Information

REPORTING PERIOD

Please report information for your most recent **12 month fiscal period**. Please indicate below the period covered by this questionnaire.

1. From ⁰⁰¹¹

YYYY				MM		DD			

 To ⁰⁰¹²

YYYY				MM		DD			

2. Did you operate this business unit for the **full year**?

- 0050 Yes → **If yes**, please go to the **Business Unit Organization and Joint Venture Activity Information** section.
- No → **If no**, please check the appropriate box(es) below.

0042 Seasonal operation (please provide the dates) From ⁰¹²⁰

YYYY				MM		DD			

 To ⁰¹²¹

YYYY				MM		DD			

0032 New business (please provide the date) ⁰⁰⁴⁶

YYYY				MM		DD			

0033 Change of fiscal year end (please provide the new end date) ⁰⁰⁵¹

YYYY				MM		DD			

0034 Change of ownership (please provide the date) ⁰¹²⁵

YYYY				MM		DD			

0035 Ceased operations (please provide the date) ⁰¹¹⁹

YYYY				MM		DD			

0036 Temporarily closed (please specify the date and the reason) ⁰⁰⁴⁹

YYYY				MM		DD			

⁰⁰³⁷

0038 Other (please specify): ⁰⁰³⁹

For information only

Business Unit Organization and Joint Venture Activity Information

1. Type of organization (please check one only):

- 0024 1 Sole proprietorship 2 Partnership 3 Incorporated company 4 Co-operative
 5 Joint venture 6 Government business entity 7 Government 8 Non-profit organization

2. Did this business unit participate in any joint venture(s) during the reporting period?

A joint venture refers to a specific commercial undertaking entered into jointly by two or more parties or companies, who agree to contribute the necessary capital and share in profits or losses of the project in agreed proportions. The association terminates either upon completion of the undertaking or at a specific time.

- 0170 Yes → **If yes**, please go to question 3. No → **If no**, please go to the **Sole Purpose of this Business Unit** section.

3. Are detailed revenue and expenses for the business unit's share in the joint venture(s) included in this questionnaire?

- 0171 Yes No

Joint Venture Activity Information

4. Please provide the name of the joint venture.

0180

5. Is this joint venture:

- 0190 Incorporated? **If incorporated**, please go to question 6.
 Unincorporated? **If unincorporated**, please go to question 7.

6. Revenue Canada Business Number of joint venture (if incorporated)

0179

7. If it is an unincorporated joint venture, please provide the length of time of the joint venture.

From 0191

YYYY		MM	DD

To 0192

YYYY		MM	DD

8. Venture partner(s) and their Revenue Canada Business Number(s) (if incorporated)

	Venture partners	Revenue Canada Business Number(s) (if incorporated)
9.	0181	0182
10.		
11.		

Note: If you participated in more than one joint venture or if more space is required, please enclose a separate page.

Sole Purpose of this Business Unit

1. Is the sole purpose of this business unit to provide services to your parent company, an affiliated company or a professional practice?

- 0029 Yes → **If yes**, please name the company or professional practice. No → **If no**, please go to the **Main Business Activity** section.

0030

Main Business Activity

Please check the **main** activity, at this business unit, that most accurately describes the **principal** source of operating revenue. Please check **one** only.

1. 541212 ⁰²⁹⁰ **Offices of Accountants**
(CA, CMA or CGA)
- 541213 ⁰²⁹¹ **Tax Preparation Services**
- 541215 ⁰²⁹² **Bookkeeping, Payroll and Related Services**
2. ⁰⁰⁴⁰ **None of the above**
(please list the main activities of this business unit and indicate the estimated percentage of total operating revenue associated with each one):
- 0041
-
-
-

Note: If you responded "**None of the above**", please call **1 888 881-3666** for further instructions.

Data-sharing Agreements

To avoid duplicating survey activity, Statistics Canada has entered into agreements with provincial and territorial statistical agencies for the sharing of data. This is done in accordance with the federal *Statistics Act* and corresponding provincial and territorial legislation. The data are to be kept confidential and used for statistical purposes only. **Your responses are not shared with Revenue Canada.** More details on data – sharing are included in this package.

Reporting Instructions

When precise figures are not available, your best estimates are acceptable.

1. Report all dollar amounts in CANADIAN DOLLARS (\$ CDN).
2. All dollar amounts reported should be rounded to whole dollars (e.g., \$55,417.40 should be reported as \$55,417).
3. Percentages should be rounded (e.g., 37.3% to 37%, 75.8% to 76%).
4. Please write clearly in ink.
5. This survey questionnaire can be faxed back to Statistics Canada at **1 888 883-7999**.

Statistics Canada advises you that there could be a risk of disclosure during the facsimile transmission. However, upon receipt of your facsimile, Statistics Canada will provide the guaranteed level of protection afforded all information collected under the authority of the *Statistics Act*.

B - Revenue

Please include:

- all Canadian revenue recorded in your accounts for sales or transfers to other businesses and to other units of your business;
- all revenue received from outside Canada by this business unit.

Please exclude:

- federal or provincial sales taxes collected for remittance to a government agency.

Revenue Totals

	\$ CDN
1. Total sales of goods and services produced	2299
2. Total operating revenue	2080
3. Total revenue (include interest income and dividends)	2098
4. Please estimate the percentage of your " Total operating revenue " reported in this section at question 2, that was generated by new or substantially improved services or other products introduced by your business unit during the last three years.	%
	2910

For information only

B - 1 Revenue by Type of Goods or Services

Please report your "Total sales of goods and services produced" reported in **Section B - Revenue**, at question 1, "Total sales of goods and services produced", by the following categories.

	\$ CDN
Assurance services, accounting and bookkeeping:	2531
1. Financial auditing services	2533
Accounting review services:	2534
2. Review engagements with compilation	2553
3. Review engagements without compilation	2535
4. Other assurance services (e.g. audit and review services not reported above)	2536
5. Compilation of financial statements services	2537
6. Other accounting services	2539
7. Bookkeeping services, except tax returns	2540
Taxation Services:	2541
8. Corporate tax planning and consulting services	2542
9. Corporate tax return preparation and review services	2543
10. Individual tax preparation and planning services	2544
11. Commodity taxes	
12. Other taxation services	
13. Insolvency and receivership services	

B - 1 Revenue by Type of Goods or Services (continued)

		\$ CDN
Consulting:		2546
14.	Strategic management and planning, organizational structure and review	2547
15.	Financial management consulting services (e.g., business valuations for mergers and/or acquisitions; analysis of capital investment proposals)	2548
16.	Human resource management and planning	2549
17.	Executive search services (including outplacement)	2550
18.	Marketing management consulting services	2551
19.	Production management consulting services (e.g., effective utilization of materials in the production process; inventory management and control; quality control standards)	2554
20.	Computer consultancy services	2552
21.	Other management consulting services (e.g., education and training)	2556
22.	Business process outsourcing (e.g., providing services which were formerly internal to the client firm)	2557
23.	Personal financial planning	2000
24.	Sales of all other goods and services produced	
	Please name major items:	
	2001	
	2002	
	2003	
25.	Total (sum of amounts reported at questions 1 to 24 must equal the amount entered in Section B - Revenue , at question 1, "Total sales of goods and services produced")	2305

C - Expenses

Please include: • all expenses within or outside Canada recorded or received by this business unit.

Please exclude: • income tax and the portion of federal or provincial sales taxes refunded by government.

\$ CDN

1. **Total expenses - Also include** interest expenses on capital lease obligations plus all other miscellaneous interest expenses such as interest on loans and the interest portion of mortgage payments.

4699

Purchased Service Expenses

Of the Total Expenses reported in this section at question 1 "Total Expenses", please report expenses for the following purchased service expenses.

Please exclude services that you produce within this business unit.

\$ CDN

2. Telephone and other telecommunication expenses

Include: • telephone, fax, cellular phone, or pager services for transmission of voice, data or image;
• Internet access charge;
• purchased cable and satellite transmission of television, radio and music programs.

4101

3. Rental and leasing expenses

Include office space or other real estate, motor vehicles, computers and peripherals, other machinery and equipment, and other goods.

4115

4. Purchased maintenance and repair service expenses including janitorial and cleaning services

Include materials, parts and labour.
Exclude property management fees.

4175

5. Payments to employment agency or personnel supplier (e.g., pay for temporary workers paid through an agency and charges for personnel search services)

3080

6. Accounting or bookkeeping work sub-contracted to others

3081

7. Legal, accounting and auditing fees

4230

8. Consulting fees

4270

9. Other professional and business service fees

Include fees for education and training, research and development, payroll preparation, etc.

4275

10. Financial service fees (e.g., bank charges, credit and debit card commissions)

Exclude interest expenses. Please report these amounts in this section, at question 1, "Total expenses".

4325

11. Insurance premiums (e.g., liability, automobile, building, equipment)

4350

4365

12. Advertising expenses

4366

13. Travel expenses

Include passenger transportation, accommodation, meals while travelling, and other travel allowances.

4367

14. Meals and entertainment expenses (e.g., performing arts events, sports events)

Include purchases for clients.

4410

15. Property and business taxes, licences and permits

Include: • property taxes (except those covered in your rental and leasing expenses);
• property transfer taxes;
• vehicle licence fees.

4440

16. Royalties and franchise fees

D - Employment Characteristics

Paid Employees

Please estimate the number of salaried and hourly employees on your payroll in a typical pay period.

Exclude contract workers (i.e., those not on your payroll who were engaged for a specific project or term).

Please allocate this number by the following:

	Number
1. Full-time employees Employees who worked the standard work week as observed by the business.	6310
2. Part-time employees Employees who worked fewer hours than standard or who worked only for a given period or season.	6311
3. Total number of paid employees (add numbers reported at questions 1 and 2 above).	6312

Categories of Paid Employees and Definitions (refer to category definitions below)

Please report each employee only once - if an employee could belong to more than one category, report him/her in the "highest" category in the table (i.e., a professional who is also a manager should be reported as a manager only).

Managers Those who carry out the functions of management by planning, organizing, coordinating, directing, controlling, staffing and formulating, implementing or enforcing policy, either directly or through other levels of management. Supervisors who do not carry out any of the above functions are not considered to be managers.
Examples: president, senior partners, vice presidents, junior partners, department heads, heads of specific product lines, assistant managers.

Professionals Employees usually requiring an undergraduate university degree or the equivalent. Exclude anyone reported as a manager above.
Examples: consultants, engineers, lawyers, accountants, articling accounting students, valuation experts, computer professionals, editors, marketing and research professionals and project managers and supervisors not in the "Manager" group.

Technical / Trades Employees requiring a community college certificate/diploma, vocational/trades accreditation or equivalent and who are not primarily involved in sales/marketing. Exclude anyone reported as a manager above.
Examples: bookkeepers, desktop publishers, computer programmers, lab technicians, draftspersons.

Marketing / Sales Non-supervisory staff primarily engaged in sales/marketing of products/services. Exclude anyone reported as a manager above.
Examples: sales and marketing staff, telemarketers. Exclude employees whose duties require a university degree or college certification or those whose duties are primarily supervisory.

Administrative, clerical, production and support staff Staff providing clerical/administrative services and staff in production or maintenance positions that require no vocational/trades accreditation or the equivalent in on-the-job training. Exclude anyone reported as a manager above.
Examples: secretaries, receptionists, mail/distribution clerks, cleaning staff and jobs that require no more than one-month's training for someone with no vocational/trade accreditation.

Other If you have employees that do not fit into any of the above categories, please specify their occupation(s).

	Number
4. Managers Include partners and working proprietors.	6331
5. Professionals	6332
6. Technical/Trades	6333
7. Marketing/Sales	6337
8. Administrative, clerical, production and support staff	6334
9. All others (please specify): 6336	6335
10. Total (the sum of questions 4 to 9 above must equal the number of paid employees reported in this section at question 3, "Total number of paid employees")	6339

Contract Workers

Please report the number of contract workers usually engaged at this business unit (i.e., during a typical pay period).

	Number
11. Contract workers individuals engaged only for the duration of a specific project or term	6320

E - Distribution of Operating Revenue by Type of Client

Data on your revenue by type of client will be used to improve information on the origins of demand for goods and services. We recognize that this may be a difficult question to answer, and welcome your suggestions on how to improve it in the **Comments** Section at the end of the questionnaire.

Please indicate the percentage of "Total operating revenue", reported in **Section B - Revenue**, at question 2, "Total operating revenue", by type of client to whom the goods or services were delivered.

	%
Clients in Canada	8100
1. Individuals and households	8120
2. Public Institutions (e.g., hospitals, schools, universities)	8130
3. Government (e.g., federal, provincial, territorial and municipal administration)	8112
4. Financial businesses (e.g., financial intermediaries including banks, trust companies, financial crown corporations)	8115
5. All other businesses (including non-financial crown corporations)	8140
6. Clients outside Canada (exports)	
Total	100%

Name of **person** reporting **Type of Client** information (if different from name on page 1)

8190

First name

Last name

Telephone number 8192
(include area code)

F - Distribution of Operating Revenue by Client Location

Data on your revenue by client location will be used to improve information on the movement of goods and services between provinces and to other countries. We recognize that this may be a difficult question to answer, and welcome your suggestions on how to improve it in the **Comments** Section at the end of the questionnaire.

Please indicate the percentage of "Total operating revenue" reported in **Section B - Revenue**, at question 2, "Total operating revenue", by the location of the client to whom the goods or services were delivered.

		%
Clients in Canada		8400
1.	Newfoundland	8415
2.	Prince Edward Island	8405
3.	Nova Scotia	8410
4.	New Brunswick	8420
5.	Quebec	8425
6.	Ontario	8430
7.	Manitoba	8435
8.	Saskatchewan	8440
9.	Alberta	8445
10.	British Columbia	8455
11.	Yukon	
Northwest Territories		
12.	Northwest Territories (excluding Nunavut)	8451
13.	Nunavut	8452
14.	Northwest Territories (old boundaries) (add percentages reported at questions 12 and 13 above)	8450
Clients outside Canada (exports)		8465
15.	United States	8470
16.	Mexico	8476
17.	All other countries	
Total		100%

G - Events That May Have Affected Your Business Unit

1. Compared to **last fiscal year**, were there any events that may have significantly affected the reported values for this business unit?

- 9929 Yes → **If yes**, please go to question 2.
 No → **If no**, please go to **Section H - Comments**.

2. Please check the box(es) that best reflect this change.

- | | |
|---|---|
| 9930 <input type="radio"/> Longer scheduled work week | 9931 <input type="radio"/> Shorter scheduled work week |
| 9932 <input type="radio"/> Increase in business | 9933 <input type="radio"/> Decrease in business |
| 9934 <input type="radio"/> More overtime | 9935 <input type="radio"/> Less overtime |
| 9936 <input type="radio"/> Foreign exchange | 9937 <input type="radio"/> Merger or acquisition |
| 9938 <input type="radio"/> Layoffs | 9939 <input type="radio"/> Increase in hiring |
| 9940 <input type="radio"/> Temporary shutdown | 9941 <input type="radio"/> Permanent shutdown |
| 9942 <input type="radio"/> Strike | 9943 <input type="radio"/> Weather |
| 9944 <input type="radio"/> Change in supplier | 9945 <input type="radio"/> Change in product line |
| 9946 <input type="radio"/> Price changes, goods or services sold (output) | 9947 <input type="radio"/> Price changes, labour or raw materials (input) |
| 9948 <input type="radio"/> Changes in industry regulation | 9949 <input type="radio"/> Changes in government taxes |
| | 9952 <input type="radio"/> Natural disaster |

3. 9950 Other (please specify):

H - Comments

1. How long did you spend collecting the data and completing this form? hours

2. **Comments?**

We invite your comments on the following topics or any others related to our business survey program. We appreciate your assistance.

- | | |
|--|--|
| <ul style="list-style-type: none"> • questionnaire content • new questions of interest to your industry • questionnaire language • use of business terminology • comprehension of questions (e.g., through definitions, examples of inclusions and exclusions, code sheets, instruction sheets, reporting guides) | <ul style="list-style-type: none"> • order and flow of questions • timing of receipt of questionnaire and the period given for response • other sources of data to further reduce response burden • potential for electronic data reporting • general (non-proprietary) business software packages in use |
|--|--|

9920

Lost the return envelope?
 Please telephone 1 888 881-3666
 or
 fax 1 888 883-7999.



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