



**CPB CANADA - CODE OF ETHICS & PROFESSIONAL CONDUCT -  
FORMAL COMPLAINT COMPLAINANT FORM**

*Last Updated: March 14, 2017*

**1. Complainant:**

Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email address: \_\_\_\_\_

**2. Member/Firm:**

Name: \_\_\_\_\_

Company Name: (if applicable): \_\_\_\_\_

Address: \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email address: \_\_\_\_\_

**3. Complainant and Member/Firm Relationship:**

a. What is your relationship to the Member/Firm?

Client       Employee       Employer       Partner

Family member       Other (please specify) \_\_\_\_\_

b. Did you hire this Member/Firm?

No

Yes (Please provide supporting documentation, such as, engagement letter(s), cheque(s) payable to the Member/Firm etc.)

When was the Member/Firm hired? \_\_\_\_\_

What was the Member/Firm hired to do? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Was the task completed?  Yes  No

Is the Member/Firm still working for you?  Yes  No

Whom did the Member/Firm report to while providing services? \_\_\_\_\_

How were you involved? \_\_\_\_\_

c. What does the subject matter of this complaint relate to?

Tax Preparation  General Bookkeeping/Accounting  Client Service Issue

Other (Please specify) \_\_\_\_\_

d. Does this complaint involve a matter before a court or other tribunal? If yes, please provide details in a separate attachment.

Yes  No

**4. Complaint:**

Please tell us about your complaint: (if you require more space, please attach a separate sheet)

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Please list and attach any supporting documents (do not send originals)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



5. What are your expectations for the outcome of this complaint (if you require more space, please attach a separate sheet):

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6. Acknowledgement, consent, and signature:

I understand and agree that the Institute of Professional Bookkeepers of Canada (IPBC) may share with, and provide copies of, the information and/or documents that it receives from me, to the named Member along with the members of the Investigation Committee. I understand that the IPBC may not be able to process my complaint without supporting documents. I have attached copies of documents that relate to my complaint as documented above.

*Note: The IPBC is a professional organization. We cannot award damages or other financial compensation. The IPBC does not resolve fee related disputes between Members and their clients or former clients.*

Date: \_\_\_\_\_ Signature of Complainant: \_\_\_\_\_