# **1. Individuals Table (Individuals)**

Stores personal details of individual clients.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **IndividualID (PK)** | INT (auto-increment) | Unique identifier for each individual. |
| **BusinessID (FK)** | INT (nullable) | Linked Business ID (from **BusinessClients** table). |
| **Member1 (FK)** | INT (nullable) | References MemberID from the Family table. |
| **Member2 (FK)** | INT (nullable) | References MemberID from the Family table. |
| **Member3 (FK)** | INT (nullable) | References MemberID from the Family table. |
| **Member4 (FK)** | INT (nullable) | References MemberID from the Family table. |
| EmployerType | VARCHAR(50) | Type of employer. |
| FirstName | VARCHAR(100) | Individual's first name. |
| LastName | VARCHAR(100) | Individual's last name. |
| SIN | CHAR(9) | Social Insurance Number. |
| DateOfBirth | DATE | Birth date of the individual. |
| ResidentStatus | VARCHAR(20) | Residency status. |
| ArrivalDate | DATE | Date of arrival in country (if applicable). |
| SourceOfIncome | VARCHAR(50) | Primary income source. |
| YearlyIncome | DECIMAL(12,2) | Yearly income. |
| Occupation | VARCHAR(50) | Occupation. |
| EmployerOrSchool | VARCHAR(100) | Name of employer or school. |
| StreetAddress | VARCHAR(100) | Street address. |
| City | VARCHAR(50) | City. |
| Province | VARCHAR(50) | Province or State. |
| PostalCode | VARCHAR(10) | Postal/ZIP code. |
| Phone | VARCHAR(15) | Phone number. |
| Email | VARCHAR(100) | Email address. |
| MaritalStatus | VARCHAR(20) | Marital status. |
| Dependants | INT | Number of dependants. |
| Website | VARCHAR(100) | Personal or business website. |
| LinkedIn | VARCHAR(100) | LinkedIn profile URL. |
| Instagram | VARCHAR(100) | Instagram profile URL. |
| Facebook | VARCHAR(100) | Facebook profile URL. |
| TikTok | VARCHAR(100) | TikTok profile URL. |
| YouTube | VARCHAR(100) | YouTube channel URL. |
| InsuranceServiceID | INT (nullable) | Linked ID from **InsuranceServices**. |
| InvestmentAccountID | INT (nullable) | Linked ID from **InvestmentAccounts**. |
| MortgageID | INT (nullable) | Linked ID from **Mortgages**. |

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# **2. Mortgages Table (Mortgages)**

Stores mortgage details for individuals.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **MortgageID (PK)** | INT (auto-increment) | Unique mortgage ID. |
| **IndividualID (FK)** | INT | Linked Individual ID. |
| HomeOwner | TINYINT(1) | Home ownership status (1 = Yes, 0 = No). |
| Lender | VARCHAR(100) | Mortgage lender. |
| OutstandingBalance | DECIMAL(12,2) | Remaining mortgage balance. |
| MarketValue | DECIMAL(12,2) | Property market value. |
| Term | VARCHAR(20) | Mortgage term. |
| InterestRate | DECIMAL(5,2) | Interest rate percentage. |
| RenewalDate | DATE | Mortgage renewal date. |

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# **3. Family Table (Family)**

Stores information about family members linked to an individual.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **MemberID (PK)** | INT (auto-increment) | Unique ID for a family member. |
| **IndividualID (FK)** | INT | Linked Individual ID. |
| FirstName | VARCHAR(100) | Family member's first name. |
| LastName | VARCHAR(100) | Family member's last name. |
| SIN | CHAR(9) | Social Insurance Number of the family member. |
| DateOfBirth | DATE | Birth date of the family member. |
| Occupation | VARCHAR(100) | Occupation of the family member. |
| Employer | VARCHAR(100) | Employer name of the family member. |
| StreetAddress | VARCHAR(100) | Street address. |
| City | VARCHAR(50) | City. |
| Province | VARCHAR(50) | Province/State. |
| PostalCode | VARCHAR(10) | Postal/ZIP code. |
| Phone | VARCHAR(15) | Phone number. |
| Email | VARCHAR(100) | Email address. |
| Website | VARCHAR(100) | Personal or business website. |
| LinkedIn | VARCHAR(100) | LinkedIn profile URL. |
| Instagram | VARCHAR(100) | Instagram profile URL. |
| Facebook | VARCHAR(100) | Facebook profile URL. |
| TikTok | VARCHAR(100) | TikTok profile URL. |
| YouTube | VARCHAR(100) | YouTube channel URL. |

# **4. InvestmentAccounts Table (InvestmentAccounts)**

Tracks investment accounts held by individuals.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **InvestmentID (PK)** | INT (auto-increment) | Unique investment record ID. |
| **IndividualID (FK)** | INT | References the individual owner. |
| InvestmentType | VARCHAR(50) | Type of investment account (e.g. TFSA, RRSP, etc.). |
| Amount | DECIMAL(12,2) | Investment amount or balance. |
| Carrier | VARCHAR(50) | Financial institution or carrier name. |
| ReturnRate | DECIMAL(5,2) | Return rate or ROI (%) for this investment. |

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# **5. InsurancePolicies Table (InsurancePolicies)**

Tracks insurance policies for individuals.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **PolicyID (PK)** | INT (auto-increment) | Unique insurance policy record ID. |
| **IndividualID (FK)** | INT | References the individual insured. |
| PolicyType | VARCHAR(50) | Type of insurance (e.g. Life, Disability, Critical Illness). |
| FaceAmount | DECIMAL(12,2) | Coverage face amount of the policy. |
| Term | VARCHAR(20) | Term of policy (years or description). |
| Premium | DECIMAL(10,2) | Premium amount (periodic payment). |
| Carrier | VARCHAR(50) | Insurance provider company. |

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# **6. BusinessClients Table (BusinessClients)**

Stores information for business clients.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **BusinessID (PK)** | INT (auto-increment) | Unique business client ID. |
| BusinessName | VARCHAR(100) | Legal name of the business. |
| CustomerStatus | VARCHAR(10) | Status of client (Active, Closed, etc.). |
| RegistrationType | VARCHAR(30) | Business registration type (Federal Corporation, Provincial Corporation, etc.). |
| Activity | VARCHAR(50) | Nature of business activity/industry. |
| DirectorName | VARCHAR(100) | Name of the director/principal contact. |
| IncorporationNumber | VARCHAR(50) | Corporation or Business ID number. |
| RegistrationDate | DATE | Date of incorporation/registration. |
| AnnualFilingMonth | VARCHAR(20) | Month or schedule for annual filings (e.g., "July" for annual return due in July). |
| BusinessNumber | VARCHAR(15) | Federal Business Number (9-digit). |
| Online | TINYINT(1) | Boolean – if CRA online access is set up (1 = Yes, 0 = No). |
| CRA\_AccessCode | VARCHAR(20) | CRA online access code (if provided). |
| HST\_Frequency | VARCHAR(10) | HST filing frequency (e.g., Monthly, Quarterly). |
| WSIB\_Frequency | VARCHAR(10) | WSIB reporting frequency. |
| Payroll\_Frequency | VARCHAR(10) | Payroll remittance frequency. |
| PaystubFrequency | VARCHAR(10) | Pay stubs issuance frequency (e.g., Weekly, Biweekly). |
| T4Service | INT (nullable) | Stores numbers (nullable). |
| BookkeepingService | VARCHAR(10) | If bookkeeping service is provided. |
| ROE\_Service | INT (nullable) | Stores numbers (nullable). |
| StreetAddress | VARCHAR(100) | Business street address. |
| City | VARCHAR(50) | City. |
| Province | VARCHAR(50) | Province/State. |
| PostalCode | VARCHAR(10) | Postal/ZIP code. |
| PhoneNumber | VARCHAR(15) | Contact phone number. |
| EmailAddress | VARCHAR(100) | Contact email address. |
| Fax | VARCHAR(15) | Fax number. |
| Website | VARCHAR(100) | Company website URL. |
| LinkedIn | VARCHAR(100) | LinkedIn profile/page URL. |
| Instagram | VARCHAR(100) | Instagram handle/URL. |
| Facebook | VARCHAR(100) | Facebook page URL. |
| TikTok | VARCHAR(100) | TikTok handle/URL. |
| YouTube | VARCHAR(100) | YouTube channel URL. |
| WSIB\_UserID | VARCHAR(50) | Login username for WSIB online account. |
| WSIB\_Password | VARCHAR(50) | Login password for WSIB account. |
| CRA\_UserID | VARCHAR(50) | Login username for CRA My Business Account. |
| CRA\_Password | VARCHAR(50) | Login password for CRA My Business Account. |
| Email\_UserID | VARCHAR(50) | Login username for business email (if tracked). |
| Email\_Password | VARCHAR(50) | Login password for business email. |
| FederalTaxAccess | VARCHAR(50) | Federal tax account access code. |
| FederalTaxKey | VARCHAR(50) | Federal tax account key/reference. |
| ProvincialTaxAccess | VARCHAR(50) | Provincial tax account access code. |
| ProvincialTaxKey | VARCHAR(50) | Provincial tax account key/reference. |
| DocumentsLink | VARCHAR(255) | Link/URL to related documents or files. |

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# **7. BusinessShareholders Table (BusinessShareholders)**

Stores the relationship between businesses and individual shareholders.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **BusinessShareholderID (PK)** | INT (auto-increment) | Unique shareholder relationship ID. |
| **BusinessID (FK)** | INT | Linked Business ID. |
| **IndividualID (FK)** | INT | Linked Individual ID (Shareholder). |

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# **8. BusinessServices Table (BusinessServices)**

Tracks the services used by business clients.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **BusinessServiceID (PK)** | INT (auto-increment) | Unique service ID for each business service. |
| **BusinessID (FK)** | INT | Foreign key referencing **BusinessClients** table. |
| HST | TINYINT(1) | **Boolean** flag for HST filing service (1 = Yes, 0 = No). |
| HST\_DueDate | DATE | Due date for HST filings. |
| WSIB | TINYINT(1) | **Boolean** flag for WSIB service (1 = Yes, 0 = No). |
| WSIB\_DueDate | DATE | Due date for WSIB filings. |
| Payroll | TINYINT(1) | **Boolean** flag for payroll services (1 = Yes, 0 = No). |
| Payroll\_DueDate | DATE | Due date for payroll services. |
| Paystubs | TINYINT(1) | **Boolean** flag for paystub services (1 = Yes, 0 = No). |
| Paystubs\_Date | DATE | Date of paystub issuance. |
| T4 | TINYINT(1) | **Boolean** flag for T4 preparation service. |
| T4\_DueDate | DATE | Due date for T4 filings. |
| CRA\_Notes | TEXT | Internal notes regarding CRA/Tax matters. |
| Corporate\_Notes | TEXT | Internal notes related to corporate filings. |
| Client\_Notes | TEXT | General notes related to the business. |
| LastUpdated | DATE | Date of last update. |
| **LastUpdatedBy (FK)** | INT | Foreign key referencing **EmployeeID** in **Employees** table. |

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# **9. Employees Table (Employees)**

Stores details of employees working with you.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **EmployeeID (PK)** | INT (auto-increment) | Unique identifier for each employee. |
| FirstName | VARCHAR(100) | Employee's first name. |
| LastName | VARCHAR(100) | Employee's last name. |
| Phone | VARCHAR(15) | Employee's phone number. |
| Email | VARCHAR(100) | Employee's email address. |
| StreetAddress | VARCHAR(100) | Employee's street address. |
| City | VARCHAR(50) | City where the employee resides. |
| Province | VARCHAR(50) | Province/State where the employee resides. |
| PostalCode | VARCHAR(10) | Postal/ZIP code of the employee's residence. |
| JobTitle | VARCHAR(50) | Job title or position of the employee. |
| Department | VARCHAR(50) | Department where the employee works (e.g., Admin, HR, etc.). |
| DateOfJoining | DATE | Date the employee joined. |
| Status | VARCHAR(20) | Employee status (Active, Inactive). |

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# **10. InsolvencyServices Table (InsolvencyServices)**

Tracks insolvency service details for individuals.

| **Field (PK/FK)** | **Data Type** | **Description** |
| --- | --- | --- |
| **InsolvencyServiceID (PK)** | INT (auto-increment) | Unique identifier for each insolvency service. |
| **IndividualID (FK)** | INT | Linked Individual ID. |
| ServiceType | VARCHAR(50) | Type of insolvency service (e.g., Bankruptcy). |
| Status | VARCHAR(20) | Status of the insolvency process (Pending, Complete). |