

## New Client Intake Form

**Tax Year:** \_\_\_\_\_

**Client Name (legal name on your SIN)**

**Spouse (if applicable)**

\_\_\_\_\_

\_\_\_\_\_

**Social Insurance Number**

**Social Insurance Number**

\_\_\_\_\_

\_\_\_\_\_

**Birthdate (dd/mm/yyyy)**

**Birthdate (dd/mm/yyyy)**

\_\_\_\_\_

\_\_\_\_\_

**Marital Status as of Dec 31**

**Anniversary**

\_\_\_\_\_

\_\_\_\_\_

**If status changed, what was the date:**

\_\_\_\_\_

**Mailing Address – include city/town, postal code & province.**

\_\_\_\_\_

**Main Phone:** \_\_\_\_\_

**Cell:** \_\_\_\_\_

**Cell:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Children (under 18 years of age as of Dec 31 of tax year) – please let us know if your child works or is in university/college or a trades school.**

**Name**

**Birthdate**

**SIN (if applicable)**

\_\_\_\_\_

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Is this your first time filing a Canadian tax return: \_\_\_\_\_

If you are new to Canada, please write the date you arrived: \_\_\_\_\_

Citizenship Status in Canada: \_\_\_\_\_

Please let us know if you, your spouse, or children have any disabilities.

\_\_\_\_\_

If your or your spouses last named changed from last year, provide previous name: \_\_\_\_\_

Did your address change from last tax year? \_\_\_\_\_

Previous address: \_\_\_\_\_

Did you sell your place of residence: \_\_\_\_\_

If your province or territory of residence changed in the tax year, what was the date: \_\_\_\_\_

Did you or your spouse own foreign property with a total cost of more than \$100,000 CDN? \_\_\_\_\_

- Own interest in a foreign affiliate at any time in tax year? \_\_\_\_\_

Are you filing for a deceased person:

Relationship: \_\_\_\_\_

Are you the administrator to the estate: If no, who is (please provide contact information)

\_\_\_\_\_

Please bring in copy of death certificate and a copy of the will (if applicable)

Please let us know if you or your spouse are self-employed. If so, do you need us to file business taxes, or a GST returns? \_\_\_\_\_

- Business Number: \_\_\_\_\_

- GST registered: \_\_\_\_\_ Filing period: \_\_\_\_\_

- GST filing papers or last period GST filed included: \_\_\_\_\_

**Slips & Receipts**

- T4 slips (Employment income)
- Employment insurance benefits (T4A or T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- T2202 Tuition and Enrollment Certificate
- Old Age Security and CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- Income outside Canada
- RRSP contribution receipts
- T4RSP
- T4RIF
- Support for spouse or common-law partner (If you receive payments, we need to know amounts)
- Custody Arrangement documentation
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Other employment expenses
- Teacher's school supplies
- Medical expenses
- Home renovations (seniors and disabled)
- Charitable donations
- Political contributions Receipts
- Childcare expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Exams for professional certification
- Digital news subscription
- Labour Mobility Deduction for Tradespeople
- Child sports receipts
- Property tax/rent receipts

**Other documentation**

- Notice of Assessment/Reassessment
- Canada Revenue Agency correspondence
- Sale of principal residence
- Sale or deemed sale of stocks, bonds, or real estate
- Northern residents deductions receipts
- Rental income and expense receipts
- Business, farm, or fishing income/expenses
- Automobile/Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200 or T2200S)
- Volunteer Firefighters certification
- Search and Rescue volunteers' certification
- Written certification for eligible educator school supplies
- Notice of Assessment (if new client)

**Did you sell your house? We need to know:**

- The proceeds of the sale
- Was it your principal residence the entire time?
- When did you buy the house, that you sold?

Please let us know if you are waiting on any slips/receipts.

If you have any questions about what can and cannot be claimed, please ask.

**Remember to keep all receipts & slips for each tax year for 7 years. This includes the NOA that you receive from the CRA after we file your taxes.**