



Kiessling & Associates

Accounting • Bookkeeping • Tax Services

NEW CLIENT Tax Intake Form

Date Received: _____

Name: _____	Spouse: _____
Birth Date: _____	Birth Date: _____
Address: _____	City: _____ Postal Code: _____
S.I.N _____	S.I.N _____
Phone: _____	Phone: _____
Email: _____	Email: _____
Authorization to give CRA email address <input type="radio"/> Y <input type="radio"/> N	Authorization to give CRA email address <input type="radio"/> Y <input type="radio"/> N
Marital Status: <input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Separated <input type="radio"/> Divorced <input type="radio"/> Common Law <input type="radio"/> Widowed	
Did your marital status change? _____	If so, date: _____

Dependants: Did any relatives live with you that we need to consider? Y N

Name	Date of Birth (D/M/Y)	Relationship	Income
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____

Important Questions:

Were you a first time homebuyer? Y N
 Did you sell your primary residence? Y N If yes, please provide details below.

Date Sold: _____ Sold for: \$ _____ Year Purchased: _____

- Do you have investments or property outside of Canada worth more than \$100,000? Y N
- Was anyone in your family a volunteer Firefighter or Search and Rescue? Y N
- Do you have Employment related expenses (with T2200) see EMPLOYEE EXPENSES Worksheet Y N
- Did you work from home and claiming basic Home Office expenses? Y N
- Did you rent out part of your home or own rental properties? *see RENTAL Worksheet Y N
- Do you operate a small business, or have other income to report not on a T-slip? Y N
- Did you receive or pay any spousal support payments? (total amount: \$ _____) Y N
- Did you pay any Legal Fees to collect child or spousal support amounts, or wages? Y N
- Did you pay any interest for investment purposes, or incur investment counsel fees? Y N
- Did anyone in your family attend post secondary education? (T2202A slips available online from school) Y N
- Are you, or any of your dependents disabled, or could possibly qualify for the tax credit? Y N

if unsure - please discuss with us! We can review form T2201 together

Do you give Kiessling & Associates permission to represent you with CRA? (signature page to follow) Y N
 Do you require a personal meeting to discuss any tax matters further prior to us starting your file? Y N

How did you hear about Kiessling & Associates? Website Other: _____
 Referred By whom? _____

Any Additional Notes: _____
