



Kiessling & Associates

Accounting • Bookkeeping • Tax Services

NEW CLIENT Tax Intake Form

Date Received: _____

Name: _____	Spouse: _____
D. of Birth: _____	D. of Birth: _____
Address: _____	
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 in 2019? If so, date: _____

Dependants: Did any relatives live with you in 2019 (or prior years) 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 in 2019? Y N

Did you sell your primary residence in 2019? Y N If yes - further info required, we will contact you

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 in 2019? Y N

Do you have Employment related expenses - for which you have a T2200 from your employer? Y N

Did you rent out part of your home or own rental properties in 2019? 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 in 2019 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? Referred By whom? _____
Website Other: _____

Any Additional Notes: _____

FOR OFFICE USE ONLY	Set up in Client Track <input type="radio"/> T1013 Completed - sent to client <input type="radio"/> by: _____
	Set up in QuickBooks <input type="radio"/> T1013 Completed - filed with CRA <input type="radio"/> by: _____