

**Taylor & Stiles Ltd**

**New Client Check List**

**For your first visit please come prepared with the following information:**

Previous year’s tax return

Name

Social Insurance Number

Address (rented or owned)

Have you sold your family home in the current tax year

Phone Number

Email address

Birthday

Marital Status

Spouse name and birthday and SIN (if not filing together, need net income)

Children (Names, date of birth and SIN if applicable)

Do you want direct deposit for any refunds etc (photocopy of void cheque)

Have you moved for work during the tax year

Has your status changed during the tax year (married, divorced, widowed etc)

Copies of any relevant slips (please refer to attached Canadian Tax Checklist)