

(TO BE FILLED BY CLIENT)

DOCUMENT / INFORMATION DESCRIPTION	CLIENT'S RESPONSE
Basic Information	
First Name and Initial	
Last Name	
DOB	(mm - dd - yyyy)
SIN	
Address	
Province of residence as of Dec 31	
Email ID	
Phone Number	
Are you registered with CRA for My Account online service?	Yes / No
Do you want to register for receiving CRA e-mail service?	Yes / No
What is your immigration status?	Citizen Permanent Resident
	Student Work Permit
Are you a new immigrant ? (came to Canada in last year)	Yes / No
What is your date of entry in Canada?	(mm - dd - yyyy)
Marital Status as of December 31st (Married, Single, Widowed, Divorced, Separated, Living Common-law)	
Did the marital status change during last year?	
If YES , provide the previous status and date of change	(mm - dd - yyyy)
Attach copy of Last year's Notice of Assessment	Yes / No
Do you own properties outside of Canada in excess of C\$ 100,000	Yes / No
If YES provide details of properties(real property, shares, bank balances etc.) There is a \$2500 penalty for not declaring	
Did you sell any house/real estate during previous year? Provide details. (Purchase Cost, Selling Price, Date of Purchase, Date of Sale, Address)	
Income Details	
Highlight the applicable T-slips below and attach copies	
T3 T4 T4A T5 T3 T5008	
Provide details of income outside of Canada	
Provide details of Share trading income (ask for template)	
Did you have business/ self employment income from running part-time or full time business? (if yes, ask for separate excel template to calculate income expenditure.)	Yes / No

Deductions Details	
RRSP Contribution Amount? (provide contribution receipt/slip)	
Donation Amount (provide tax receipts)	
Tuition Fees credit amount (attach Form T2202)	
Medical Expenses (ask for template)	
Did you work from home and received form T2200? Provide home office expense details (ask for template)	
Do you need to claim first time home buyer credit? (provide closing date of your home)	
Dependent Details	
Do you have dependent children? Provide details	
Did you provide care for any dependent person? Provide details	
Trillium Benefits	
Did you pay rent for your home?	
How much rent paid for the whole year?	
For how many months ?	
Name of the Landlord	
Did you pay Property Taxes for your home?	
How much amount was paid?	
Name of the municipality to whom property tax was paid	

CLIENT ACKNOWLEDGEMENT

I hereby declare that all the information given above is true to the best of my knowledge. I provide my consent to JNJ Accounting Services, its employees or third party contractors/agents (collectively "JNJ Accounting Services") to use and disclose the above information for the purposes of providing their services, advisory, preparation of my tax returns and for representation in front of government authorities. I understand that providing wrong or forged information may result in inaccurate advice, miscalculation of my tax liabilities or benefits, filing of erroneous tax returns and disciplinary/legal actions from authorities. I take sole and complete responsibility of any financial, legal or disciplinary consequences that may arise due to providing erroneous, wrongful or forged information to JNJ Accounting Services.

CLIENT NAME

	(PRINT NAME)
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CLIENT SIGNATURE

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DATE

	(MM - DD - YYYY)
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