

Pinnacle Accounting & Tax



Client Information Form

Tax Year _____

This form must be completed in full before our office can start your tax return

☐ Prior Client ☐ New Client

Taxpayer Name (Last) _____ (Middle) _____ (First) _____

SIN _____

Date of Birth mm/dd/yy _____

Contact Number _____

Email Address _____

Marital Status ☐ Single ☐ Married ☐ Separated ☐ Divorced ☐ Commonlaw ☐ Widowed

Canadian Citizen ☐ Yes ☐ No

Date of Immigration mm/dd/yy _____

Spouse Information

Name (Last) _____ (Middle) _____ (First) _____

SIN _____

Date Of Birth mm/dd/yy _____

Contact Number _____

Email Address _____

Canadian Citizen ☐ Yes ☐ No

Date of Immigration mm/dd/yy _____

Address ☐ Own (attach 2024 Property Taxes) ☐ Rent

Sold Principle Residence in 2024 Yes / No

Year of Original Acquisition _____ Proceeds of Disposition _____

Current Home Address

Apt # _____ Street _____

City _____ Province _____

Postal Code _____

Dependents

Name (last) (Middle) (First)	Date of Birth(mm/dd/yy)	Daycare/Camp	Disability	Tution T2202
1 _____	_____	_____	_____	_____
2 _____	_____	_____	_____	_____
3 _____	_____	_____	_____	_____
4 _____	_____	_____	_____	_____

Please tick mark what is applicable

	Yes	No
Provide a copy of Notice Of Assesment (NOA)	_____	_____
Elected Split-Pension Income	_____	_____
New Home Buyer	_____	_____
FHSA	_____	_____
Foreign Pension Received	_____	_____
File Self Employment Return	_____	_____
Any Family Member Disabled	_____	_____
Spousal Support	Paid Y/N	Received Y/N
Child Support	Paid Y/N	Received Y/N
Amount	_____ Per _____	_____

Personal Income Tax Checklist



Please use the checklist below to make sure you have included all the documents for your taxes

CRA Assesment

Last Year NOA ☐
 Instalment Payments ☐

Employment Income

T4 ☐
 T4 A ☐
 T4PS ☐

Employment Expenses

T2200 plus a list of all the expenses ☐

Pension Income

T4 A ☐
 T4 OAS ☐
 T4AP ☐
 T4RIF ☐
 T4RSP ☐

Investment Income

T3 ☐
 T5 ☐
 T5008 ☐
 T5013 ☐

Capital Gains

T5013 ☐
 Trading summaries from Brokers ☐
 Annual statement from Mutual Funds ☐

Other Income

Rental income and expense information ☐
 Self Employment income and Expenses ☐

Deduction and Credits

RRSP (Must obe offical Receipt) ☐
 Child Care Receipts ☐
 Adopotion Expenses ☐
 Support Payment Information ☐
 Disabilty Support Deduction ☐
 Caregiver/Disabilty amount ☐
 Moving Expenses ☐
 Tution Fees T2202/2202A ☐
 Student Loan Interset slips ☐
 Union/ Professional Dues ☐
 New Home Buyer ☐
 Investment advice and accounting Fees ☐
 Investment advice and accounting Fees ☐
 Interset on investment Loans ☐
 Donations (Must be Offical Receipts) ☐
 Installent Payment Information ☐
 Medical/Dental Receipts ☐

I accept the above information is correct and I authorize Pinnacle Accounting & Tax to prepare my Personal Income Tax Return

Signature

Date mm/dd/yy