



Chartered Professional Accountant  
 225 – 1855 Kirschner Road, Kelowna, BC V1Y 4N7  
 P: (236) 420 – 4801 | E: info@creeksideaccounting.ca

**PERSONAL INTAKE FORM**  
**(FOR INDIVIDUALS AND NON-INCORPORATED BUSINESSES)**

**Primary Contact Information**

First, Middle, Last Name				
Preferred Name		<input type="checkbox"/> Single	<input type="checkbox"/> Common-Law	<input type="checkbox"/> Married
SIN		<input type="checkbox"/> Divorced	<input type="checkbox"/> Separated	<input type="checkbox"/> Widowed
Date of Birth (M / D / Y)		Phone		
Occupation		Email		
Has your marital status changed? <input type="checkbox"/> No <input type="checkbox"/> Yes		Date of change:	Previous status:	

**Spouse / Partner's Contact Information**

First, Middle, Last Name				
Preferred Name		<input type="checkbox"/> Single	<input type="checkbox"/> Common-Law	<input type="checkbox"/> Married
SIN		<input type="checkbox"/> Divorced	<input type="checkbox"/> Separated	<input type="checkbox"/> Widowed
Date of Birth (M / D / Y)		Phone		
Occupation		Email		
Will Creekside Accounting be filing a tax return for this person? <input type="checkbox"/> Yes <input type="checkbox"/> No				If no, what is their net income: _____
Has their marital status changed? <input type="checkbox"/> No <input type="checkbox"/> Yes		Date of change:	Previous status:	

**Your Current Mailing Address**

Street Address	
City, Province, Postal Code	

**OPTIONAL ADD-ONS**

Would you like to purchase a \$95 Audit Response package for your family?	<input type="checkbox"/> Yes <input type="checkbox"/> No	When purchased in conjunction with tax return services, a \$95 Audit Response investment provides first-responder services free of charge in the event of an audit. Services are transferrable and can be used by any family member whose return is on the invoice.
Would you like to expediate the preparation of your returns for \$25 per person?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Jump the line and have your tax returns prepared more quickly with a \$25 per person investment. We'll prioritize your returns to get you in and out more quickly.
Would you like to save time and purchase a \$15 no hassle document return option?	<input type="checkbox"/> Yes <input type="checkbox"/> No	With a \$15 no hassle document return option we'll package and mail your families personal documents to you upon the completion of your tax services. Save time on pickup and have your documents mailed.

**REAL ESTATE**

Have you sold a property in the past 18 months?	<input type="checkbox"/> Yes <input type="checkbox"/> No	(If yes, please provide the purchase and sale Statements of Adjustments)		
Was this home your principal residence (PR)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you own any other property during the time you are designating this home as your PR?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you collect rental income, provide the address:				

**MOVING**

Previous mailing address (if moved in past 18 mo.)				
Did you move more than 40kms for work?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Approximate date of move:		
Did you own the home you previously lived in?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, are you now renting out this home?	<input type="checkbox"/> Yes	<input type="checkbox"/> No



Chartered Professional Accountant  
 225 – 1855 Kirschner Road, Kelowna, BC V1Y 4N7  
 P: (236) 420 – 4801 | E: info@creeksideaccounting.ca

### ANNUAL INQUIRIES

Do you own any foreign property or foreign investments (including US stocks) with a total cost of more than \$100,000?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a Canadian Citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Would you like to update your name, address, and date of birth with <b>Elections Canada</b> ?	<input type="checkbox"/> Yes <input type="checkbox"/> No

### PERSONAL CONSIDERATIONS

Dependents (Children Under 18, Post-Secondary Students, Disabled Individuals, Elderly Parents)

Name	Birthdate	SIN	Relationship	Tax Return to Be Filed?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

### OTHER INFORMATION

What types of services do you want?	<input type="checkbox"/> Personal Taxes <input type="checkbox"/> Excel Summary / Bookkeeping <input type="checkbox"/> Payroll <input type="checkbox"/> PST <input type="checkbox"/> GST <input type="checkbox"/> Retirement Consult GST / CRA Number: _____ PST Number: _____
Bookkeeping program preference	<input type="checkbox"/> Sage50 <input type="checkbox"/> QuickBooks Online <input type="checkbox"/> Excel Summary
How did you hear about us?	
What are your expectations for our services?	
Preferred contact method:	<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Text
Records format preference:	<input type="checkbox"/> Paper <input type="checkbox"/> Electronic / PDF
How would you like to authorize Creekside Accounting as a representative (required before services can begin)?	<input type="checkbox"/> Grant immediate access through your personal CRA <a href="#">MyAccount</a> or by calling CRA (1-800-959-8281): <ul style="list-style-type: none"> <li>• Creekside Accounting Ltd.'s business number <b>755066693</b></li> <li>• <b>Level 2 Access &gt; No Expiry Date (please)</b></li> </ul> <input type="checkbox"/> I will sign an authorization form provided by Creekside Accounting (takes 2 – 14 days for CRA to process)

Any questions for the accountant? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_