

Island Pacific Accounting and Tax Services

Personal Tax Information Form

1. Personal Details

- Full Name: _____
 - Initials (for website/testimonials, optional): _____
 - Date of Birth: ____ / ____ / ____
 - Social Insurance Number (SIN): _____
 - Address: _____
 - City: _____ Postal Code: _____
 - Phone Number: _____
 - Email Address: _____
 - Preferred Contact Method: ☐ Email ☐ Phone ☐ Other
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2. Tax Year(s) to File

- Tax Year(s): _____
 - Previous Tax Returns Filed? ☐ Yes ☐ No
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3. Income Sources (*Check all that apply*)

- ☐ Employment (T4)
 - ☐ Pension / Retirement Income
 - ☐ Self-Employment / Business Income
 - ☐ Rental Income
 - ☐ Investments (T3/T5/T5008)
 - ☐ Other: _____
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4. Tax Credits & Deductions (*Optional for preparer to know*)

- ☐ RRSP Contributions
- ☐ Tuition / Education (T2202)
- ☐ Medical Expenses
- ☐ Childcare Expenses
- ☐ Donations
- ☐ Other: _____

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5. Foreign / Cross-Border Information

- Did you own or hold specified foreign property where the total cost amount of all such property, at any time in the year, was more than CAN\$100,000? ☐ Yes ☐ No
 - Did you earn income outside Canada? ☐ Yes ☐ No
 - Country(ies): _____
 - Are you a non-resident for Canadian tax purposes? ☐ Yes ☐ No
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6. Documents to Upload

- T-slips (T4/T5/T3)
 - RRSP/TFSA contribution slips
 - Rental or business statements
 - Foreign income documents
 - Other supporting documents
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7. Additional Notes / Questions

Privacy Disclaimer

All information provided is confidential and securely handled in compliance with Canadian privacy laws. By submitting this form, you consent to Island Pacific Accounting & Tax Services using your information for personal tax preparation and related services.