

# Client Intake form

## Tax Payer Information

First Name			Last Name			SIN 999-999-999		
Date of Birth	Sex	Phone		eMail			Residency Status	
		Cell						
		Home						
Address					Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Common Law <input type="checkbox"/> Widowed		
City					Canadian citizen	<input type="checkbox"/> Yes <input type="checkbox"/> Election <input type="checkbox"/> No		
Province			Any changes in marital status during the year?		<input type="checkbox"/> Yes <input type="checkbox"/> No			

## Partner's Information

First Name			Last Name			SIN 999-999-999		
Date of Birth	Sex	Phone		eMail			Residency Status	
		Cell						
		Home						
Address (if different from taxpayer)								

## Dependents <sup>(1)</sup>

First name	Last name	SIN 999-999-999	Date of Birth	Sex	Relationship	Disabled (Y/N)
				<input type="checkbox"/> M <input type="checkbox"/> F		<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> M <input type="checkbox"/> F		<input type="checkbox"/> Yes <input type="checkbox"/> No

Notes	
-------	--

## Income

- ☐ T4 – Employment Income
- ☐ T4A - Pension and scholarships income
- ☐ T4A(P) – Canada Pension income
- ☐ T4A(OAS) - Old Age Security benefits
- ☐ T4E - Employment Insurance benefits
- ☐ T4RIF - RRIF withdrawals
- ☐ T4RSP - RRSP withdrawals
- ☐ T3, T5 - Interest, dividends and investment income
- ☐ T5008 – capital gains and investment income for stocks/bonds/mutual funds disposed
- ☐ T5007 - Social assistance received
- ☐ T5007 - Worker's compensation benefits
- ☐ Employee stock options exercised
- ☐ Foreign Income
- ☐ Foreign Pension Income
- ☐ *any other income related documents*

## Expenses & Others

- ☐ Medical receipts (*rather than bringing many receipts, it is better, to ask your pharmacy for a summary report at the end of year for tax purposes*)
- ☐ Private health insurance plan receipts
- ☐ Charity and political party receipts
- ☐ Professional or Union dues receipts
- ☐ Investment Management fees or carrying charges
- ☐ Property taxes or rent paid
- ☐ Tax instalments paid
- ☐ Eligible teacher school supplies certified by school (*for teachers only*)

## RRSP

- ☐ RRSP contributions receipts

- ☐ First time home buyers
- ☐ Repayment of Home Buyer Plan (HBP) or Lifelong Learning Plan (LLP)

## Family Expenses

- ☐ Marital status change in the year
- ☐ Child care expenses
- ☐ Spousal support payments paid or received
- ☐ Custody arrangements documentation (*in case of separation or divorce*)
- ☐ Adoption expenses
- ☐ Ontario Staycation credit

## Student Expenses

- ☐ Tuition and education T2202A
- ☐ Student loan interest paid

## Special Expenses

- ☐ Rental Income and expenses
- ☐ Business / self-employed Income and Expenses
- ☐ Vehicle travel logbook and expenses, start and end of year odometer readings (*for those claiming motor vehicle expenses*)
- ☐ Sale of principal residence
- ☐ Home renovations receipts (*for seniors and disabled*)
- ☐ Moving expenses (*for distances exceeding 40 KM, for new job or education*)
- ☐ Declaration of employment conditions signed by employer (T2200)
- ☐ Tradespersons and apprentice mechanics tools
- ☐ CRA correspondence
- ☐ Number of days working from home due to COVID (flat rate)
- ☐ Home office space and related expenses
- ☐ *any other expenses receipt*