 **NEW T1 CLIENT INTAKE FORM 2022**

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIN \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse/Partner \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SIN\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(for CRA)

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(if separate number (cell) for us to contact you)

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Marital Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dependents: First/Last Names, Birthdates, SIN if available

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you a: Canadian Resident\_\_\_\_ Northern Resident\_\_\_\_ US Citizen\_\_\_\_ *(check all that apply)*

Do you own foreign assets including investments and income producing properties

with a cost that exceeds $100,000? YES NO

Do you have interest in any foreign affiliates? YES NO

Did you sell any real estate, including either your home or cottage in 2022? YES NO

 *if yes: Primary Residence – year of purchase and legal documents for the sale*

 *Cottage/Rental property/Other real estate – purchase documents, sale documents and other related costs*

Did you move in 2022? YES NO

 *If yes: Old address:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Did you move more than 40 kms for work or school? YES NO

 If yes: Do you have moving expenses to claim? YES NO

Did your marital status change in 2022? YES NO

*Nature of and date of marital status change:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you or any dependents approved for the disability tax credit? YES NO

Are you the primary caregiver for anyone? Have you been approved for the primary caregiver credit? YES NO

Did you work at home due to covid? YES NO

 *If yes: How many days in total did you work at home?* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you receive CRB/CRCB/CRSB/CWLB YES NO

Did you purchase RRSP’s in 2022? YES NO

Did you purchase RRSP’s in Jan or Feb 2023? YES NO

Donation Receipts? YES NO

*If yes, is this your first year claiming donations? YES NO*

Did you make installment payments in 2022? YES NO

*If yes: Total installments made? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

First-Time Home Buyer in 2022? YES NO

Are you a volunteer firefighter? YES NO

Child Care Expenses? YES NO

Children Fitness Expenses? YES NO

Medical Expenses? YES NO

Employment Expenses? YES NO

Teacher Expenses? YES NO

Rental Properties? YES NO

Investments (non registered)? YES NO

Rent? YES NO

Self Employment? YES NO

Student? YES NO

*If yes: Paid tuition? (T2202)* YES NO

 *Where did you go to school?*

 *If beneficial, would you like tuition transferred to parents?*  YES NO

**Possible Slips/Information Required:**

**T4 T3 T5 T5018 T5008 Investment Statements (non registered) T4OAS T4AP (CPP) T4RIF T4RSP – and any other slips received, Property Taxes (school tax rebate), T2202 (Tuition)**

**Notes:**