|  |  |  |  |
| --- | --- | --- | --- |
|  | **First Name Last Name** | **Cell Number** | **Email ID** |
| **Taxpayer** |  |  |  |
| **Spouse** |  |  |  |
| **Marital Status** | □ Single | □ Married | □ Common-law | □ Widowed | □ Divorced | □ Separated |

Did you change your address since your last visit to our office? ***If Yes, provide your new address***

|  |  |
| --- | --- |
| **New Address** |  |

If there was any change in your marital status during 2023, provide the date of change (yyyy/mm/dd) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Was there any change in the number of your dependents during 2023? Yes / No: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Canadian Citizens? Yes/No\_\_\_\_\_. Do you want to provide information to Elections Canada? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Whether taxpayer/spouse is self-employed (e.g. real estate agent, mortgage specialist, taxi/uber driver etc)? Yes/No \_\_\_\_\_\_

Does the taxpayer/spouse own foreign investments / property (cost of which is over CAD $100,000)? Yes/No\_\_\_\_\_\_\_\_\_\_\_\_\_

Did the taxpayer / spouse sell any (principal or rental) real estate property during 2023? Yes/No \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did the taxpayer / spouse **immigrate to** Canada or **emigrate from** Canada in **2023**? Yes/No \_\_\_ Date of entry/exit\_\_\_\_\_\_\_\_\_

**CHANGE IN DEPENDENTS? Provide details (children / parents / other persons with disability – conditions apply)**

|  |  |  |  |
| --- | --- | --- | --- |
| **First and Last name** | **Date of birth (YYYY/MM/DD)** | **SIN # (if available)** | **Relationship to client** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**PROPERTY TAXES / RENT PAID**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Address** | **Months** | **Rent paid** | **Prop. Tax**  | **Name of Landlord/Municipality** |
|  |  |  |  |  |

**Checkmark Applicable Items**

|  |  |  |
| --- | --- | --- |
| **INCOME**□ T3 Trust Income Allocations□ T4 Employment Income□ T4 Employment Insurance Income□ T4A Pension, Retirement, Annuity, and Other Income□ T4RSP, T4RIF, **T4FHSA (new)**□ T5 Investment income□ T5007 Statement of Benefits□ T5008 Statement of Securities Transactions□ T5018 Statement of Contract Payments□ T5013 Statement of Partnership Income□ Foreign pensions□ Amount of spousal support received | □ Self employment income□ Rental income and expenses.□ Capital gains□ Income from foreign assets / sources **DEDUCTIONS**□ RRSP contribution slips(Mar to Dec 2023 and Jan to Feb 29, 2024)**□ First Home Savings Account - FHSA**□ Child care expense receipts□ Amount of spousal support paid□ Moving expenses□ Employment expenses - T2200 | □ TL2 meals & lodging for transportation employees□ Legal fees paid to establish spousal support□ Legal fees paid to recover wages from your employer**COMMON CREDITS**□ Tuition fee slips (T2202A / TL11)□ Medical expense□ First time home buyer□ Donations□ Student loan interest receipts□ Disability tax credit - T2201□ Home Accessibility Credit□ Multigeneration home tax credit |

Client Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_