|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_