



Income Tax Plus Inc.

Personal Income Tax Intake Form

Last Name, First Name

Email Address

Tax Year (Circle One)

Are you a Canadian Citizen? (Circle One)

2019	2018	2017	Yes	No
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Date of Birth

Telephone Number

MM / DD / YYYY	
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Mailing Address

STREET ADDRESS		
CITY	PROVINCE	POSTAL CODE

Marital Status (Circle One)

Single	Separated	Living Common-Law	Divorced	Married	Widowed
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* Living Common-Law – Lived together for one year, or live together and have a child together.}

Did your marital status change in the tax year?
Please indicate date of change.

MM / DD / YYYY

Are we preparing a return for your spouse?

Yes

No

Yes Please complete another package for your spouse.	No Please indicate your spouse's Net Income \$
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Do you Pay or Receive Spousal Support?

\$ Pay	\$ Receive
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Dependants

Name	Date of Birth	Relationship to You

Did you sell your principal residence in the tax year?

Year of Purchase: Y Y Y Y	STREET ADDRESS		
Sale Price: \$	CITY	PROVINCE	POSTAL CODE

Were you a first-time homebuyer in the tax year?

Closing Date MM / DD / YYYY

Property Tax Paid

Municipality

\$	
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Rent Paid

\$	x	Months =	/year
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Landlord's Name

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Address

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If you would like us to update your direct deposit information, please include a void cheque or direct deposit slip.

If you attended College or University in the tax year, please include your T2202 Tutiton Receipt

Please check all that apply

- I am a NEW client – I have never filed with Income Tax Plus Inc.
- I am claiming self-employed small business income
- I am HST registered
- I am claiming farming income
- I am claiming income from a rental property
- I have a T2200 Declaration of Conditions of Employment
- I have daycare receipts
- I have student loan interest to claim
- I have a home-buyers plan repayment
- I have medical expenses to claim
- I have union or professional dues to claim

Notes

Please add any information you would like us to have here.
