



# Income Tax Plus Inc.

## Personal Income Tax Intake Form

Last Name, First Name

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Email Address

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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

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Are we preparing a return for your spouse?

Yes

No

<b>Yes</b> Please complete another package for your spouse.	<b>No</b> 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 Tuition 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.

[illegible]