**Please fill out** the following form. Provide as much detail as possible. If you have any questions while completing this form, please do not hesitate to ask. Our Tax Professional will contact you to set up an appointment to **finalize** your tax return.

**Client Information:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Last Name** | **First Name** | **Date of Birth** | **SIN Number** | **Phone Number** | **Disabled** |
|  |  | dd/mm/yyyy |  |  | YES ----NO---- |
| **Address:** | **City:** | **Postal Code:** |
| **Email** | **Only for first time Fillers:** | **Date of entry:** | **Direct deposit:** |
| **Institution #** | **Transit #** | **Account #** |
|  |  |  |  |  |

**Marital Status on December 31 last year**: Single \_\_\_Married \_\_\_Common-law \_\_\_Widowed \_\_\_Separated \_\_\_Divorced\_\_\_

**Date of Marriage**: dd/mm/yyyy

**Spouse or Common-law partner information:**(if applicable)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Last Name** | **First Name** | **Date of Birth** | **SIN Number** | **Phone Number** | **Disabled** |
|  |  | dd/mm/yyyy |  |  | YES ----NO---- |
| **Email** | **Only for first time Fillers:** | **Date of entry:** | Direct deposit: |
| **Institution #** | **Transit #** | **Account #** |
|  |  |  |  |  |

**Dependents**\*: (if applicable) Son, Daughter, Parents, Grandparents, etc - living at the same address

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Last Name** | **First Name** | **Date of Birth** | **Relationship** | **Net Income** | **Post-Sec Student** | **Disabled** |
|  |  | dd/mm/yyyy |  | $ \_ \_ \_ \_ \_ \_ | YES ---NO--- | YES ---NO--- |
|  |  | dd/mm/yyyy |  | $ \_ \_ \_ \_ \_ \_ | YES ---NO--- | YES ---NO--- |
|  |  | dd/mm/yyyy |  | $ \_ \_ \_ \_ \_ \_ | YES ---NO--- | YES ---NO--- |
| **Annual Rent payment :** | **Land Lord name:** |  |  |

1. A) Are you a U.S. Citizen by birth or bloodline? B) Do you meet the Green Card Test (Lawful Permanent Resident of U.S.)? C) Were you PHYSICALLY PRESENT in U.S. at least 183 days during current year? YES \_\_ NO\_\_\_
2. Do you have an incorporated business? YES \_\_ NO\_\_\_
3. Are you self-employed, did you own your own business, or did you work for a placement agency? YES \_\_ NO\_\_\_
4. Did you work outside Canada or have foreign employment or foreign pension income? YES \_\_ NO\_\_\_
5. Excluding RRSPs, do you have any investments, own any rental properties or sell your principal residence last year? YES \_\_ NO\_\_
6. Are you claiming employment expenses (did your employer reimburse you for office or vehicle expenses)? YES \_\_ NO\_\_\_
7. Did you move to Canada last year or switch provinces? YES \_\_ NO\_\_\_
8. Are we preparing more than one return for you today, i.e. 2021, 2020…? YES \_\_ NO\_\_\_

|  |
| --- |
| **Required Documents for Tax 2024:** |
| **New Comers** | Photo ID,SIN number, Void check, Date of entry, Phone number, Email, Medical Expenses, Donation |
| **Students** | Tuition Certificate (T2202), Interest income (T5), |
| **Employee** | T4, T2200, T777, RRSP & FHSA contrib. , Moving exp., daycare exp, |
| **Self Employed** | T4A, Car info, Gas, Car insurance, Lease or finance info, Rent, Phone Bills, Cert& Training, Meals, Supplies, Dues, Advertising |

