

## NEW clients

The information provided to us is strictly confidential and used only by our office and CRA (where applicable).

### PART 1 (Personal Information)

#### Taxpayer

SIN# \_\_\_\_\_

First Name \_\_\_\_\_ (as shown on CRA Notice of Assessment)

Last Name \_\_\_\_\_ (as shown on CRA Notice of Assessment)

Address \_\_\_\_\_ Suite# \_\_\_\_\_

City \_\_\_\_\_ Postal Code: \_\_\_\_\_

Address changed this year \_\_\_\_\_

Home Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Date of Birth (yy/mm/dd) \_\_\_\_\_

Email address \_\_\_\_\_

Do you have a CRA online account \_\_\_\_\_

Email known to CRA \_\_\_\_\_ (if different than provided above)

Marital Status \_\_\_\_\_

Date of status change: \_\_\_\_\_ (If changed in the current tax year)

1st time filing Income tax? \_\_\_\_\_

Middle name \_\_\_\_\_ (if 1<sup>st</sup> time filing taxes with CRA)

Canadian Citizen Yes \_\_\_\_\_ No \_\_\_\_\_

Do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada?  
Yes \_\_\_\_\_ No \_\_\_\_\_

Did you sell your principal residence in the tax year?  
Yes \_\_\_\_\_ No \_\_\_\_\_

Did you dispose of a rental property in the tax year?  
Yes \_\_\_\_\_ No \_\_\_\_\_

Did you own foreign property at any time in the tax year worth more than 100,000 CAN?  
Yes \_\_\_\_\_ No \_\_\_\_\_

Did you own an interest in a foreign affiliate at any time in the tax year?  
Yes \_\_\_\_\_ No \_\_\_\_\_

DTC on file with CRA Yes \_\_\_\_\_ No \_\_\_\_\_ Disability Tax Credit (DTC)

**Spouse Information (If applicable)**

SIN# \_\_\_\_\_

First Name \_\_\_\_\_ (as shown on CRA Notice of Assessment)

Last Name \_\_\_\_\_ (as shown on CRA Notice of Assessment)

Address changed this year \_\_\_\_\_

Cell Phone \_\_\_\_\_

Date of Birth (**yy/mm/dd**) \_\_\_\_\_

Email address \_\_\_\_\_

Do you have a CRA online account \_\_\_\_\_

Email known to CRA \_\_\_\_\_ (if different than provided above)

1st time filing Income tax? \_\_\_\_\_

Middle name \_\_\_\_\_ (if 1<sup>st</sup> time filing taxes with CRA)

Canadian Citizen Yes \_\_\_\_\_ No \_\_\_\_\_

Do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada?

Yes \_\_\_\_\_ No \_\_\_\_\_

Did you sell your principal residence in the tax year?

Yes \_\_\_\_\_ No \_\_\_\_\_

Did you dispose of a rental property in the tax year?

Yes \_\_\_\_\_ No \_\_\_\_\_

Did you own foreign property at any time in the tax year worth more than 100,000 CAN?

Yes \_\_\_\_\_ No \_\_\_\_\_

Did you own an interest in a foreign affiliate at any time in the tax year?

Yes \_\_\_\_\_ No \_\_\_\_\_

DTC on file with CRA Yes \_\_\_\_\_ No \_\_\_\_\_ Disability Tax Credit (DTC)

**Dependant information (if applicable)**

Name	Relationship	Birthdate	Date of change (If applicable)	DTC on file
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Do you have parents over 65 that now live with you?      Yes \_\_\_\_\_ No \_\_\_\_\_

Any changes to you or anyone in your household’s health (i.e. unable to walk a city block without difficulty) If yes, please explain \_\_\_\_\_  
\_\_\_\_\_

Do you or anyone in your household have a disability? If yes, please explain \_\_\_\_\_  
\_\_\_\_\_

Change in Direct Deposit information (**Please provide a void cheque**)

Other concerns (Please specify) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## ***PART 2 (Checklist)***

***This following checklist is generic so all the slips or information listed may or may not be required. This checklist is a guide to assist you in remembering what may apply to your situation.***

- ☐ T4 Slips for those earning employment. Ensure you receive a T4 from EVERY place worked in the current tax year.
- ☐ T4AP & T4AOAS slips for Canada Pension & Old Age Security
- ☐ T5 Slips for all financial institutions where you are paid interest
- ☐ T3 Slips for any investment companies where you may have mutual funds
- ☐ Investments: Contact your financial advisor for a realized gains/losses report and all T3's and T5's as well as supplementary information.
- ☐ Advisor fees. Contact your financial advisor for fees paid for your investments.
- ☐ Tuition receipts. T2202'S for you, your spouse and/or your dependant children who will be transferring their tuition credits to you
- ☐ Childcare: ***Complete the CHILDCARE worksheet from the FORMS section on our website***
- ☐ Donation: ***Complete the DONATION worksheet from the FORMS section on our website***
- ☐ Medical/Dental: ***Complete the Medical worksheet from the FORMS section on our website***
  - Don't forget Travel Medical costs and Residential Care Fees.
- ☐ Rental Income: ***Complete the Rental worksheet from the FORMS section on our website***
- ☐ Small Business: ***Complete the Business worksheet from the FORMS section on our website***
- ☐ Vehicle for work: ***Complete the Vehicle ONLY worksheet from the FORMS section on our website***
- ☐ Work from Home: ***Complete the Work from Home worksheet from the FORMS section on our website***
- ☐ Moving: ***Complete the Moving worksheet from the FORMS section on our website***
- ☐ BC Renter's: ***Complete the BC Renter worksheet from the FORMS section on our website***