

## Existing 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)

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)

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
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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 \_\_\_\_\_

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***