

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 1st 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 _____

Do you authorize CRA to share your name & address to BC Transplant for the purpose of being contacted by email about organ and tissue donation?
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 1st 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 _____

Do you authorize CRA to share your name & address to BC Transplant for the purpose of being contacted by email about organ and tissue donation?

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 <i>(If applicable)</i> | SIN# <i>(If applicable)</i> | 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 **(CRA no longer allows tax preparers to submit or update Direct Deposit Information)**

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 Ensure you receive a T4 from EVERY place worked in the current tax year.
- T4AP & T4AOAS Canada Pension & Old Age Security
- T5 Slips Financial institutions where you are paid interest
- T3 Slips Investments companies where you may have mutual funds
- Investment 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 NON-registered 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***
- Renters ***Complete the BC Renter worksheet from the FORMS section on our website***