**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 issue 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)

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**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 issue 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)

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**Dependant information (if applicable)**

Name Relationship Birthdate Date of change DTC on file

(*If applicable*)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

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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 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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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) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***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 Residental 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***