

CVITP 2020-2021 Client Information Sheet



Name: _____ Social Insurance Number: _____

Telephone number: _____ Date of birth (dd-mm-yyyy): _____

Most recent address on file with Canada Revenue Agency:

Street/Apt. # Street Name City Province Postal Code

Marital status:

Married Living Common-law Widowed Divorced Separated Single

Did your marital status change in 2020? No Yes, Date of Change: _____

Spousal/Common-law partner Information:

Name: _____ Social Insurance Number (SIN): _____

Date of Birth (dd-mm-yyyy): _____

Net Income (only required if filing separately, not recommended): _____

***Note:* In certain situations, your spouse's or common-law partner's net income must be stated even if your marital status has changed. If you separated during the tax year & are unable to get this information, it may affect some claims. Please use your best estimate of your ex-spouse's net income.

- Is this the first year that you are filing a Canadian Tax return? Yes No

- Did you own foreign property of over \$100 000 (Canadian)? Yes No

- Did you sell a principal residence in 2020? Yes No
- If yes, please see attached section on reverse: **Sale of Principal Residence.**

- Do you have Canadian Citizenship? Yes No
If yes, do you authorize CRA to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Elections? Yes No

Newcomers:

- Did you immigrate to Canada in 2020? Yes No
 - **If yes, please respond to the following questions:**
 - What is your date of entry? (dd-mm-yyyy): _____
 - Did you earn any Canadian sourced income while you were not a resident of Canada?
 Yes No Income: _____
 - What is your foreign sourced income earned for the portion of the year where you were not a resident of Canada? Country: _____ Income(include the currency): _____

Indigenous:

- Are you a status Indian with rights to exempt income Yes No

**** Please complete reverse side of the form**

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Dependant Information:

First and last name	Date of birth	Relationship to you*	Net income (if applicable)

*son, daughter, brother, sister, niece, nephew, aunt, uncle, father, mother, grandmother, grandfather, great grandmother, great grandfather, grandson, granddaughter, son-in-law, or daughter-in-law

Deductions:

Medical:	
Child care:	
Donations:	

Other Information: _____

SALE OF PRINCIPAL RESIDENCE

Capital gain taxes do **not** apply if the home you sold was your primary residence for the entire time you owned it. If the home that you sold was not your principal residence, you may have to report all or part of the capital gain and therefore you are **not** eligible for CVITP this year.

If you sold a house in 2020 please provide the following information:

Was this your principal residence for the entire time you owned the property: Yes No

Date you purchased the property: Day: _____ Month: _____ Year: _____

Purchase price of your property: \$ _____

Date you sold the property: Day: _____ Month: _____ Year: _____

Selling price of your property: \$ _____

If you have a spouse or common-law partner, who will claim the proceeds of the sale on their income tax return?

One of you claims the entire proceeds: _____
(name of person making the claim)

Or you will each claim a share of the proceeds: _____
(names of both partners)

Civic address of the primary residence you sold (required):

Were you a non-resident during any of the time you owned the property: Yes No

If the answer to this question is "yes", please provide dates for the time you were a non-resident:
