

New Client Personal Tax Intake – Taxation Year(s) _____

Name: _____ SIN: _____ Birth Date: _____
First, Last year/mm/dd

Spouse: _____ SIN: _____ Birth Date: _____
First, Last year/mm/dd

Address: _____

Email(s): _____

Phone: (H) _____ (C) _____ (W) _____

MARTIAL STATUS Married Single Common-Law Separated Divorced Widowed
 If changed in the year, please provide date (year/mm/dd): _____

DEPENDENT INFORMATION

<u>Name/Relationship</u>	<u>Date of birth</u> <small>year/mm/dd</small>	<u>SIN</u>	<u>T4/T4A</u>	<u>Disability Tax Credit</u> <small>approved by CRA</small>	<u>Tuition</u>	<u>Daycare</u> <small>(incl. preschool)</small>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FOREIGN PROPERTY/INVESTMENTS/STOCKS (INCLUDES US)

Own/hold any foreign property costing more than \$100,000?
 (including US stocks invested through Canadian brokers) Yes No

DID YOU DISPOSE OF PROPERTY IN THE YEAR? Yes No

WAS IT YOUR PRINCIPAL RESIDENCE? Yes No
 If yes, see note 1 on back

ARE YOU A CANADIAN CITIZEN? Yes No

DO YOU WANT TO PROVIDE NAME, ADDRESS, DOB AND CITIZENSHIP INFORMATION TO ELECTIONS CANADA? Yes No

ENGAGEMENT LETTER

The purpose of this letter is to outline the nature of our involvement with your Income Tax Return for the years noted above. As agreed, we will compile the necessary information in accordance with the standards applicable to compilation engagements and will complete the necessary forms and schedules required to file your return(s). We will not audit, review, or otherwise attempt to verify the accuracy or the completeness of such information. Unless unanticipated difficulties are encountered, our communication will be substantiated in the Notice to Reader section below.

All returns are to be paid in full upon completion.

Client Signature: _____

Date: _____

Prior Year Tax Information

- Tax return(s) from last year filed
- Direct deposit – void cheque attached if not set up or account changed

Income

- T4 slips
- T4A (commission/self-employment/pension)
- T4E (employment insurance)
- T5007 (social assistance)
- T4AP (Canada pension plan benefits)
- T4A (OAS) old age security
- T4A(RCA) retirement compensation arrangement
- T4RSP (registered retirement savings plan)
- T4RIF (registered retirement income fund)
- T3 (income from trust allocations)
- T5 (investment income)
- T5013(A) (partnership income)
- T5008 (income from security transactions)
- Sale of stocks/bonds (attach gains/loss statement)
- Support payments received (attach support agreement)
- Foreign pension
- Self-employment (attach list of revenue/expenses)
- Rental income (attach list of revenue/expenses)

Deductions/Credits (attach receipts)

- RRSP contributions
(include first 60 days of current year receipts)
- Childcare expenses for each child
- Medical expenses
- Charitable donations and political contributions
- Union and professional dues
- Support payments made – attach support agreement
- Disability tax credit approved by CRA
- T2202 (Tuition/education amounts) - signed if transferring
- Student loan interest statement
- Employment expenses – signed T2200 attached
- Interest paid to earn investment income
- Teacher’s school supplies receipts
- New home buyers’ amount – attach purchase agreement
- Volunteer firefighter/search & rescue - attach statement
- Accounting fees (investment income)
- Moving expenses
- Northern Resident Deduction

Note 1: Disposition of principal residence

If you sold your principal residence in the tax year, please complete the following:

Address of the property: _____

Year of acquisition: _____ Sale Price: _____

Was it your principal residence the entire time? (e.g. used as rental): _____

Is the property jointly owned with spouse/other? Yes No - If yes, split %: _____