



Other Services Used in Office

- Payroll & WSIB filing
- Bookkeeping & HST
- Corporate Returns (T2)

Client Information Sheet

Personal Information

Returning Client – enter only new information

First Name		Last Name		Date of Birth		SIN#	
Email				Home Phone		Cell Phone	
Canadian Citizen		<input type="checkbox"/> Yes	<input type="checkbox"/> No	If No, Date of Entry to Canada:			
Marital Status on Dec 31 st		<input type="checkbox"/> Single		<input type="checkbox"/> Married		<input type="checkbox"/> Common-Law	
		<input type="checkbox"/> Separated		<input type="checkbox"/> Divorced		<input type="checkbox"/> Widowed	
Marital Status Changed?		<input type="checkbox"/> Yes		<input type="checkbox"/> No		Own \$100,000+ of Foreign Property?	
		<input type="checkbox"/> Yes		<input type="checkbox"/> No		<input type="checkbox"/> Yes	
		<input type="checkbox"/> No				<input type="checkbox"/> No	
Paperless Return and/or NOA?		<input type="checkbox"/> Yes		<input type="checkbox"/> No		Sold your Residence during the Tax Year?	
		<input type="checkbox"/> Yes		<input type="checkbox"/> No		<input type="checkbox"/> Yes	
		<input type="checkbox"/> No				<input type="checkbox"/> No	

Spouse (if applicable)

Returning Client – enter only new information

Name		Date of Birth		SIN#			
Email				Home Phone		Cell Phone	
Canadian Citizen		<input type="checkbox"/> Yes	<input type="checkbox"/> No	If No, Date of Entry to Canada:			

Address

Street Address		Yearly Property Tax		Monthly Rent	
		\$		\$	
City		Province		Postal Code	

Dependants

Name	Relationship	Date of Birth	SIN#

Applicable Tax Credits and Other Items

<input type="checkbox"/> RRSP Contributions	<input type="checkbox"/> Student Loan Interest	<input type="checkbox"/> Tool Expenses (Tradespersons)
<input type="checkbox"/> Medical Expenses	<input type="checkbox"/> Child Care Expenses	<input type="checkbox"/> Employment Expenses (T2200)
<input type="checkbox"/> Charitable or Political Donations	<input type="checkbox"/> Moved 40km+ for Work/School	<input type="checkbox"/> Moved to/from Canada
<input type="checkbox"/> Disability Tax Credit	<input type="checkbox"/> Legal Fees (Severance/Support)	<input type="checkbox"/> Caregiver or Eligible Dependant
<input type="checkbox"/> First Time Home Buyer	<input type="checkbox"/> Spousal Support Paid / Received	<input type="checkbox"/> Accessibility Renos (65+)
<input type="checkbox"/> Professional/Union Dues	<input type="checkbox"/> Sold Investments or Real Estate	<input type="checkbox"/> Truckers Expenses (TL2)
<input type="checkbox"/> Tuition Fees (T2202)	<input type="checkbox"/> Business or Rental Income	<input type="checkbox"/> Other (enter in comments)

Comments

