

PERSONAL TAX CLIENT INTAKE FORM

CONFIDENTIAL INFORMATION

This form collects information necessary for tax preparation services. All information provided will be kept strictly confidential in accordance with professional standards and privacy regulations.

A. Personal Information

Taxpayer Information

Full Legal Name: _____

Postal Code: _____

Social Insurance Number (SIN): _____

Email Address: _____

Date of Birth (DD/MM/YYYY): _____

Phone Number: _____

Current Address: _____

Citizenship Status:

City: _____

☐ Canadian Citizen

☐ Permanent Resident

☐ Temporary Resident

Province: _____

☐ Other (Please specify): _____

Spouse/Common-Law Partner Information (if applicable)

Full Legal Name: _____

Email Address: _____

Social Insurance Number (SIN): _____

Phone Number: _____

Date of Birth (DD/MM/YYYY): _____

Is your spouse's tax return being prepared by us? ☐ Yes ☐ No

Marital Status as of December 31 of the Tax Year

☐ Single

☐ Separated

☐ Married

☐ Divorced

☐ Common-Law

☐ Widowed

If your marital status changed during the tax year, please provide the date of change (DD/MM/YYYY): _____

Dependent Information

For each dependent (children or other relatives you support):

Dependent 1

Full Legal Name: _____

Relationship to you: _____

Social Insurance Number (SIN): _____

Date of Birth (DD/MM/YYYY): _____

Net Income for the tax year:

\$ _____

Does this dependent live with you?

☐ Yes ☐ No

If part-time, number of months in the year:

Dependent 2

Full Legal Name: _____

Relationship to you: _____

Social Insurance Number (SIN): _____

Date of Birth (DD/MM/YYYY): _____

Net Income for the tax year:

\$ _____

Does this dependent live with you?

☐ Yes ☐ No

If part-time, number of months in the year:

B. Residency Information

Were you a resident of Canada for the entire tax year?

☐ Yes ☐ No

If no, please provide:

Date of entry to or departure from Canada (DD/MM/YYYY): _____

Previous/new country of residence: _____

Are you considered a resident of another country under a tax treaty?

☐ Yes (Country: _____)

☐ No

C. Income Sources

Please check all that apply for the tax year and provide supporting documentation:

Employment Income

- ☐ T4 - Employment income
- ☐ T4A - Pension, retirement, annuity, or other income
- ☐ T4E - Employment insurance benefits
- ☐ T4AP - Canada Pension Plan benefits
- ☐ T4OAS - Old Age Security benefits
- ☐ T4PS - Profit sharing
- ☐ T4RIF - Registered Retirement Income Fund income
- ☐ T4RSP - Registered Retirement Savings Plan income
- ☐ Commission Income
- ☐ Foreign Employment Income

Did you work from home during the tax year? ☐ Yes ☐ No

If yes, did your employer require you to work from home? ☐ Yes ☐ No

Total days worked from home: _____

Self-Employment Income

- ☐ Sole proprietorship/unincorporated business
- ☐ Partnership
- ☐ Professional income
- ☐ Farming income
- ☐ Fishing income

Investment Income

- ☐ T3 - Trust income
- ☐ T5 - Investment income (interest, dividends)
- ☐ T5008 - Securities transactions
- ☐ T5013 - Partnership income
- ☐ Foreign investment income
- ☐ Capital gains/losses from sale of stocks, bonds, property
- ☐ Cryptocurrency transactions

Rental Income

- ☐ Rental property income in Canada
- ☐ Foreign rental property income

Address of rental property(ies): _____

Other Income

- ☐ Alimony/spousal support received
- ☐ Child support received (if taxable)
- ☐ Foreign pension income
- ☐ Scholarship, fellowship, bursary, or grant income
- ☐ Other income not listed above (please specify): _____

D. Deductions and Credits

Please check all that apply for the tax year and provide supporting documentation:

Deductions

- ☐ RRSP contributions
- ☐ Union or professional dues
- ☐ Childcare expenses
- ☐ Moving expenses (moved 40km+ closer to work/school)
- ☐ Alimony/spousal support paid
- ☐ Home office expenses for employees
- ☐ Employment expenses (T2200 required)
- ☐ Interest paid on investment loans
- ☐ Interest paid on student loans
- ☐ Medical expenses
- ☐ Digital news subscription expenses
- ☐ Northern residents' deduction
- ☐ Other deductions not listed (please specify): _____

Tax Credits

- ☐ Charitable donations
- ☐ Political contributions
- ☐ Tuition fees (T2202)
- ☐ Home accessibility expenses
- ☐ Disability tax credit (for you or dependents)
- ☐ Caregiver amount
- ☐ First-time home buyer's tax credit
- ☐ Home renovation tax credits (provincial/territorial)
- ☐ Climate action incentive
- ☐ Other tax credits not listed (please specify): _____

E. Foreign Reporting Requirements

Did you own foreign property at any time during the tax year with a total cost of more than \$100,000 CAD? ☐ Yes ☐ No

If yes, please provide details (T1135 required): _____

Do you have foreign bank accounts? ☐ Yes ☐ No

F. Prior Year Tax Information

Are we preparing your tax return for the first time? ☐ Yes ☐ No

If yes, please provide:

- ☐ Copy of last year's tax return
- ☐ Copy of Notice of Assessment from your most recent tax filing
- ☐ Any reassessments received in the past 3 years

G. Life Events During the Tax Year

Please check any that apply:

- ☐ Purchased a home
- ☐ Sold a home
- ☐ Started a business
- ☐ Closed a business
- ☐ Changed employment
- ☐ Retired
- ☐ Marriage or common-law relationship began
- ☐ Separation or divorce
- ☐ Birth or adoption of a child
- ☐ Death in the family
- ☐ Emigrated from or immigrated to Canada
- ☐ Declared bankruptcy
- ☐ Other significant event: _____

I. Electronic Filing and Communication Consent

Do you authorize us to:

E-file your tax return with the CRA. ☐ Yes ☐ No

Register for CRA online mail (if not already registered). ☐ Yes ☐ No

Communicate with you via email regarding your tax affairs. ☐ Yes ☐ No

Obtain information from CRA on your behalf as needed. ☐ Yes ☐ No

Represent you to CRA regarding this tax return? ☐ Yes ☐ No

J. Additional Information

Please provide any additional information that you believe may be relevant to your tax situation:

Certification

I certify that the information provided in this questionnaire is, to the best of my knowledge, true, correct, and complete. I understand that this information will be used to prepare my income tax return, and I will be responsible for any penalties or interest that may result from incomplete or inaccurate information that I have provided.

Taxpayer Signature: _____ Date: _____

Spouse Signature (if applicable): _____ Date: _____

Thank you for completing this questionnaire. Please return it along with all relevant tax documents and receipts.

OFFICE USE ONLY

Received by: _____ Date: _____

Client ID: _____ Assigned to: _____

Notes: _____