

Client Information Sheet

Personal Information

Returning Client – enter only new information

NAME		DATE OF BIRTH		SIN#			
EMAIL	HOME PHONE	CELL PHONE	CANADIAN CITIZEN				
			YES	NO			
MARITAL STATUS ON DEC 31 ST	Single	Married	Common-law	Separated	Divorced	Widowed	
MARITAL STATUS CHANGED?	Yes	No	Own \$100,000+ of Foreign Property			Yes	No
Paperless Return and/or NOA	Yes	No	Sold Principal Residence During Tax Year			Yes	No

Spouse (if applicable)

Returning Client – enter only information

NAME		DATE OF BIRTH		SIN#	
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Address

STREET ADDRESS	YEARLY PROPERTY TAX	MONTHLY RENT
CITY	PROVINCE	POSTAL CODE

Dependants

NAME	RELATIONSHIP	DATE of BIRTH	SIN #
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Applicable Tax Credits and Other Items

- | | | |
|--|--|--|
| <input type="checkbox"/> RRSP Contributions | <input type="checkbox"/> Moved 40kms+ for Work/School | <input type="checkbox"/> Employment Expenses (T2200) |
| <input type="checkbox"/> Medical Expenses | <input type="checkbox"/> Legal Fees (Severance or Support) | <input type="checkbox"/> Moved to/From Canada |
| <input type="checkbox"/> Charitable or Political donations | <input type="checkbox"/> Sold Investments or Real Estate | <input type="checkbox"/> Caregiver or Eligible Dependent |
| <input type="checkbox"/> Disability Tax Credit | <input type="checkbox"/> Rental or Business Income | <input type="checkbox"/> Accessibility Renovations (65+) |
| <input type="checkbox"/> First time Home Buyer | <input type="checkbox"/> Tool Expenses (Tradesperson) | |
| <input type="checkbox"/> Professional/Union Dues | | |
| <input type="checkbox"/> Tuition Fees (T2202) | | |
| <input type="checkbox"/> Student Loan Interest | | |
| <input type="checkbox"/> Child Care Expenses | | |

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Comments