

Date Received \_\_\_\_\_

S.I.N. \_\_\_\_\_

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

M  F

Yes No

- Previously filed Income Tax Return or NOA Attached?   If no, please sign T1013 and confirm address on last filed return
- Are you a Canadian Citizen?
- Home Buyers RRSP or Life Learning Loan Repayment Required?   If yes, amount \_\_\_\_\_  
(Amount and year of withdrawal)
- Have you purchased or received foreign assets valued over \$100,000?   If yes, details required  
- cash, real estate, stocks, bonds, etc.
- Okay to give name and address to Elections Canada for the Voting List?
- First time home buyer in tax year? (Can't have owned a home in 4 years prior to tax year)
- Want Direct Deposit? (Bank acct nbr required prior to processing return)
- Did you make your first charitable donation in tax year?
- Did you serve as an emergency services volunteer in the tax year?
- Did you complete any eligible apprenticeship training during the tax year?   Details \_\_\_\_\_  
(What course & level or year completed)

**NEW CLIENTS**

Address \_\_\_\_\_

Postal Code \_\_\_\_\_

Home Telephone \_\_\_\_\_

Business Telephone \_\_\_\_\_

Occupation \_\_\_\_\_

Email Address \_\_\_\_\_

Marital Status \_\_\_\_\_

Date of Marital status change if in tax year \_\_\_\_\_

Spouse's Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address (If Different) \_\_\_\_\_

Postal Code \_\_\_\_\_

S.I.N. \_\_\_\_\_

Tax year Net Income (if not preparing return) \_\_\_\_\_

**DEPENDENTS** - includes children, parents, grandparents, aunts, uncles & in-laws living at same address.

Name \_\_\_\_\_

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Date of Birth \_\_\_\_\_

Relationship \_\_\_\_\_

Relationship \_\_\_\_\_

S.I.N. \_\_\_\_\_

S.I.N. \_\_\_\_\_

Tax year Net Income \_\_\_\_\_

Tax year Net Income \_\_\_\_\_

**GENERAL**

YES NO

Safety Deposit Box (If have investment income)   Annual Fee Paid? \_\_\_\_\_

Do any of the above have a disability that restricts their mobility, sight, hearing, etc? (T2201 required)

**OTHER INFORMATION**

\_\_\_\_\_  
\_\_\_\_\_