

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

