

Date Received _____

S.I.N. _____

Name _____

Date of Birth _____

M

F

Yes

No

2011 Tax Return or NOA Attached?

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 property valued over \$100,000?

if yes, location and income reported

Okay to give name and address to Elections Canada for the Voting List?

First time home buyer in 2012? (Can not have owned a home in 4 years prior to tax year)

Want Direct Deposit? (Bank acct nbr required prior to processing return)

Did you serve as a volunteer firefighter for more than 200 hours in 2012?

Did you complete any eligible apprenticeship level training during 2012?

Details _____

(What course and year completed)

NEW CLIENTS

Address _____

Postal Code _____

Home Telephone _____

Business Telephone _____

Occupation _____

Email Address _____

Marital Status _____

Date of Marital status change if in 2012 _____

Spouse's Name _____

Date of Birth _____

Address (If Different) _____

Postal Code _____

S.I.N. _____

2012 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. _____

2012 Net Income _____

2012 Net Income _____

GENERAL

YES

NO

Safety Deposit Box (If have investment income)

Any of above with disability that keeps them from feeding, dressing or caring for themselves? (T2201 Required)

OTHER INFORMATION
