

Personal Tax Information Form



Page 1 - Please read carefully & complete in full. Thank you for helping us keep our records updated and complete.

Contact & Personal Information

Name

Primary phone number

Current address

E-mail

Preferred contact method

Social insurance number (SIN)

Date of birth (DOB) mm/dd/yyyy

If your address changed in the past year, indicate date of change.

Province of residence at December 31st.

If the tax client has passed away, provide date (yyyy/mm/dd).

	Married	Single	Common law	Widowed	Divorced	Separated
Current marital status						

If your marital status changed in the past year, provide date of change.

Spouse's name

Spouse's DOB (mm/dd/yyyy)

Spouse's SIN

Spouse's net income if we are NOT preparing their tax return (line 236 on tax return)

Please list all your dependants: name, relation, DOB (mm/dd/yyyy), and SIN

Personal Income Tax Information (Some questions have part b if you answer yes)

	Yes	No
1. Did you sell any non-registered investments or changed/transferred any investment accounts?		
2. Do you own foreign property (shares/investments/homes, etc.) with combined value of \$100,000 CAD? <u>If yes, fill out our Foreign Property Checklist.</u>		
3. Do you have rental property? <u>If yes, fill out our Rental Property Checklist.</u>		
4. Do you have a spouse/dependent with a tuition amount to be transferred? <u>If yes, have them sign page 2 of the T2202A/T11L slip.</u>		
5. Can the Canada Revenue Agency provide your name, address and DOB to Elections Canada?		
6. Was your spouse dependant on you due to mental or physical infirmity?		
7. You do not have to pay tax in Canada because you are an officer/servant of another country (ie: diplomat) or you are a family member/employee of that person?		
8. Did you sell your principal residence? If yes, answer question 8b.		
9. Have you claimed bankruptcy in the previous two years? If yes, answer 9b.		
10. Are you a sole proprietor (un incorporated business)? <u>If yes, fill out our Sole Proprietor Checklist.</u>		
11. Is your business registered for GST?		
12. Do you want us to complete your GST return?		

8b. If you sold your principle residence, please provide date of sale and provide purchase & sale documents.

9b. Please provide date of bankruptcy.

13. What is your citizenship?

Canadian

US

Other

14. Do you, your spouse or your dependent have a disability credit (T2201)?

Yourself

Spouse

Dependent

The above information I provided is up to date & correct, and I have disclosed all sources of income earned this tax year for the preparation of this personal tax return (FORM MUST BE SIGNED AND DATED).

Signature

Date

How did you hear about us?