

PERSONAL TAX INFORMATION – NEW CLIENTS

PERSONAL INFORMATION

Name: _____

(First name, middle initial, last name)

Address: _____

City/Province: _____ Postal Code: _____

Phone Number: _____ E-mail: _____

SIN: ____/____/____ Birth date (dd/mm/yy): _____

Marital Status: _____

SPOUSE *(including common-law – living together 3 months or more):*

If marital status changed during the year, enter date of change: _____

*(If marital status has changed in past year please provide details of Separation Agreement/
deduction allocation or marriage date and certificate)*

Name	Birthdate (dd/mm/yy)	SIN

If there has been a marriage or common law relationship breakdown, please discuss it with us.

Brief description of information being dropped off or uploaded electronically:

Will you be away at any time between today and April 30?

If Yes: What is the best way to contact you when you are away?

DEPENDANTS *(children, parents and others dependent on you for financial support)*

<i>Name</i>	<i>Birthdate (dd/mm/yy)</i>	<i>SIN</i>

If you are claiming a disability tax credit for any member of your family please provide us with their name, relationship and copies of any paperwork filed with the CRA or filled out by your doctor.

Did you or your spouse/common-law, at any time during the calendar year hold foreign property (cash, mutual funds, investments, businesses or property) with a cost of more than \$100,000 CDN? Yes No

Do you authorize CRA to provide your name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors? Yes No

Have you signed up for My Account with CRA? Yes No

If you have, you can sign up for Online Mail/receive your Notice of Assessment in My Account rather than by regular Canada Post mail.

Terms and conditions as per CRA - By providing an email address, you are registering for online mail and authorizing the CRA to send you email notifications when there is mail for you to view on My Account. Any notices and correspondence delivered online on My Account will be presumed to have been sent on the date of that email notification. You understand and agree that your notice of assessment and notice of reassessment, and any future correspondence eligible for online delivery will no longer be mailed.

Having read the Terms and Conditions, I am informing you I have signed up for CRA My Account and would like to register for online mail. Please provide the following email address to the Canada Revenue Agency: _____

Did you sell your Principal Residence in 2020? Yes No

If Yes: Please provide sale information & original purchase date.

If Yes: Was it 100% personal use all years? Yes No

If No: please provide purchase information & details of other use.

Not reporting the sale of your principal residence can have major consequences including a large fine

IF YOU HAD RENTAL OR BUSINESS INCOME, PLEASE PROVIDE US WITH A FULL COPY OF YOUR PREVIOUS YEAR INCOME TAX RETURN INCLUDING THESE SCHEDULES

Please remember potential scam emails/calls claiming to be from CRA

CRA does not send emails to individuals other than a notice to check My Account for a Notice of Assessment or other mail. If you have not signed up for My Account, you should not be receiving emails from CRA. Never follow a link provided in these emails and never pay a debt without independent verification of amounts due. Please feel free to discuss any concerns with us.

Office Use only:

Information Received by: _____ Date Received: _____