

S.I.N. _____ Date of Birth (YYYY/MM/DD): _____

First Name: _____ Last Name: _____

Street/FR Address: _____

City: _____ Postal Code: _____

Main Phone: _____ Alternate Phone: _____

Email address: _____ ☐

Marital Status as of December 31:

NOTE: SEPARATED APPLIES TO ANYONE WHO HAS CLAIMED AS MARRIED OR COMMON-LAW ON ANY PREVIOUS YEAR. COMMON-LAW STARTS AFTER 12 MONTHS OF COHABITATION UNLESS YOU SHARE A BIOLOGICAL OR ADOPTED CHILD. IF YOU DO, THEN COMMON-LAW HAPPENS WHEN YOU START LIVING TOGETHER.

Did this change in this tax year? If so, what date? _____

Are you a **Canadian Citizen**?

Do you want to provide/update information to **Elections Canada**?

Do you own **foreign property** worth more than **\$100,000**?

Were you **in prison** for more than **90 days in the tax year**?

Did you file for **bankruptcy** in the tax year we are filing?

Is this the **first time** you have ever filed income tax anywhere?

Did you sell your **primary residence** in the tax year(s) we are filing?

If you sold a property:

Year bought: _____

Bought for: \$ _____

Sold for: \$ _____

of years it was your
primary residence: _____

Spouse's Information

S.I.N. _____ Date of Birth (YYYY/MM/DD): _____

First Name: _____ Last Name: _____

Main Phone: _____ Alternate Phone: _____

Email address: _____ ☐

Are you a **Canadian Citizen**?

Do you want to provide/update information to **Elections Canada**?

Do you own **foreign property** worth more than **\$100,000**?

Were you **in prison** for more than **90 days in the tax year**?

Did you file for **bankruptcy** in the tax year we are filing?

Is this the **first time** you have ever filed income tax anywhere?

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If you sold a property:

Year bought: _____

Bought for: \$ _____

Sold for: \$ _____

of years it was your
primary residence: _____

PLEASE TURN OVER TO COMPLETE YOUR INTAKE FORM

If you own a business:

Name of Business

CRA Business #

Are you an HST Registrant?

Do you have **employees**?

If yes, roughly how many? _____

Dependants

Name

Birthday (YYYY/MM/DD)

Relationship

SIN

_____	_____		
_____	_____		
_____	_____		
_____	_____		
_____	_____		
_____	_____		
_____	_____		

If you pay or receive spousal support and pay or receive child support it is important to declare both on your income tax to ensure both parties are declaring income and deductions properly. Spousal support can only be credited or earned after all child support obligations are met. If this applies to you, please fill out the following:

Spousal Support

Child Support

You cannot claim a child as an eligible dependant if you pay child support for him or her. If there has been a change, CRA will not accept a written agreement if a court order has been supplied previously.

Does anyone have a disability?

Diagnosis/Disability Information:

Name(s): _____

Do you have direct deposit with CRA?

Changes or sign up for direct deposit?

Transit: _____ Institution: _____ Account: _____

Notes:**Referred By:**