

2021 NEW CLIENT INFORMATION

Tax Payer 1

NAME

ADDRESS:

Date of Birth:

SIN#

CONTACT:

Home#

Cell #

Email

Tax Payer 2

NAME:

ADDRESS:

Date of Birth:

SIN#

CONTACT:

Home #

Cell #

Email

MARITAL STATUS

Single

Married

Common-Law

Divorced

Separated

Widowed

Did your name or marital status change in the year?

YES

NO

Official date of change: _____

Did you attach a copy of the legal agreement?

YES

NO

DEPENDANT'S INFORMATION

NAME(S):	DATE OF BIRTH	S.I.N.	ATTENDING POST-SECONDARY SCHOOL?	
_____	_____	_____	<input type="checkbox"/> YES	<input type="checkbox"/> NO
_____	_____	_____	<input type="checkbox"/> YES	<input type="checkbox"/> NO
_____	_____	_____	<input type="checkbox"/> YES	<input type="checkbox"/> NO

PERSONAL TAX INFORMATION

PROV. OF RESIDENCE (DEC 31):

ARE YOU A CANADIAN CITIZEN? YES NO

GIVE INFO. TO ELECTIONS CANADA? YES NO

DO YOU HAVE A TFSA? YES NO

FIRST TIME HOME BUYER? YES NO

SOLD PRINCIPAL RESIDENCE IN 2021? YES NO

PROV. OF RESIDENCE (DEC 31):

ARE YOU A CANADIAN CITIZEN? YES NO

GIVE INFO. TO ELECTIONS CANADA? YES NO

DO YOU HAVE A TFSA? YES NO

FIRST TIME HOME BUYER? YES NO

SOLD PRINCIPAL RESIDENCE IN 202? YES NO

Date Sold: _____ Sale Price: _____ Original Purchase Date: _____ Purchase Price: _____

DO YOU OWN FOREIGN PROPERTY? YES NO

ARE YOU SELF-EMPLOYED? YES NO

IS DIRECT DEPOSIT SET UP? YES NO

DO YOU HAVE A DISABILITY TAX CREDIT? YES NO

DID YOU WORK FROM HOME DUE TO COVID-19? YES NO

DO YOU OWN FOREIGN PROPERTY? YES NO

ARE YOU SELF-EMPLOYED? YES NO

IS DIRECT DEPOSIT SET UP? YES NO

DO YOU HAVE A DISABILITY TAX CREDIT? YES NO

DID YOU WORK FROM HOME DUE TO COVID-19? YES NO

Total number of days you worked from home in 2021 due to COVID-19:

DO YOU HAVE A RENTAL PROPERTY? YES NO

RRSP SLIPS FOR THE FIRST 60 DAYS OF 2022? YES NO

ONLINE SEARCH FOR SLIPS? YES NO

DO YOU HAVE A RENTAL PROPERTY? YES NO

RRSP SLIPS FOR THE FIRST 60 DAYS OF 2021? YES NO

ONLINE SEARCH FOR SLIPS? YES NO

ADDITIONAL NOTES

Multiple horizontal lines for additional notes.