NEW CLIENT INFORMATION

Tax Payer 1	Tax Payer 2
NAME	***NAME:***
ADDRESS:	***ADDRESS:***
Date of Birth:	**Date of Birth:**
SIN#	**SIN#**
CONTACT:	***CONTACT:***
Home#	**Home #**
Cell #	**Cell #**
Email	**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?***
			☐ **YES** ☐ **NO**
			☐ **YES** ☐ **NO**
			☐ **YES** ☐ **NO**

PERSONAL TAX INFORMATION

PROV. OF RESIDENCE (DEC 31):			***PROV. OF RESIDENCE (DEC 31):***		
ARE YOU A CANADIAN CITIZEN?	☐ **YES**	☐ **NO**	ARE YOU A CANADIAN CITIZEN?	☐ **YES**	☐ **NO**
GIVE INFO. TO ELECTIONS CANADA?	☐ **YES**	☐ **NO**	GIVE INFO. TO ELECTIONS CANADA?	☐ **YES**	☐ **NO**
DO YOU HAVE A TFSA?	☐ **YES**	☐ **NO**	DO YOU HAVE A TFSA?	☐ **YES**	☐ **NO**
FIRST TIME HOME BUYER?	☐ **YES**	☐ **NO**	FIRST TIME HOME BUYER?	☐ **YES**	☐ **NO**
SOLD PRINCIPAL RESIDENCE IN THE TAX YEAR?	☐ **YES**	☐ **NO**	SOLD PRINCIPAL RESIDENCE IN THE TAX YEAR?	☐ **YES**	☐ **NO**

Date Sold: Sale Price: Year Purchased:

DO YOU OWN FOREIGN PROPERTY?	☐ **YES**	☐ **NO**	DO YOU OWN FOREIGN PROPERTY?	☐ **YES**	☐ **NO**
ARE YOU SELF-EMPLOYED?	☐ **YES**	☐ **NO**	ARE YOU SELF-EMPLOYED?	☐ **YES**	☐ **NO**
IS DIRECT DEPOSIT SET UP?	☐ **YES**	☐ **NO**	IS DIRECT DEPOSIT SET UP?	☐ **YES**	☐ **NO**
DO YOU HAVE A DISABILITY TAX CREDIT?	☐ **YES**	☐ **NO**	DO YOU HAVE A DISABILITY TAX CREDIT?	☐ **YES**	☐ **NO**
DID YOU WORK FROM HOME?*	☐ **YES**	☐ **NO**	DID YOU WORK FROM HOME?*	☐ **YES**	☐ **NO**

*If yes, please include your completed Conditions of Employment form (T2200) with your documents.

DO YOU HAVE A RENTAL PROPERTY?	☐ **YES**	☐ **NO**	DO YOU HAVE A RENTAL PROPERTY?	☐ **YES**	☐ **NO**
RRSP SLIPS FOR THE FIRST 60 DAYS?	☐ **YES**	☐ **NO**	RRSP SLIPS FOR THE FIRST 60 DAYS?	☐ **YES**	☐ **NO**
ONLINE SEARCH FOR SLIPS?	☐ **YES**	☐ **NO**	ONLINE SEARCH FOR SLIPS?	☐ **YES**	☐ **NO**

***New tax changes have been introduced!**

Please visit the Canada Revenue Agency website (https://www.canada.ca/en/revenue-agency.html) for more information on:

-First Home Savings Account

-Multigenerational Home Renovation Tax Credit

-Residential Property Flipping Rule.

ADDITIONAL NOTES