

Personal Income Tax Return

New Client Intake Form 2024



Contact Preferences:

1. Once completed, how would you like to receive your tax return for signature?
2. What is your preferred method of communication?
3. Would you like to schedule a meeting to review your return in detail after it is completed?
(A \$100 fee applies to cover our time. We will always reach out if there are any important tax considerations beyond this meeting. Signing with our admin does not count as a meeting.)

Identification and Contact Information:

Full Name:	
SIN Number:	
Birthday:	
Address:	
Email:	
Phone Number:	

Family & Household Information:

Each family member for whom we are preparing a return must **complete a separate form** since income and deductions vary by individual..

1. **Marital Status:** Single Married Common-law Separated Divorced Widowed
2. **Do you have dependents?** Yes No
 - a. If yes, how many? _____

Spouse or Dependent's Full Name	Relationship	SIN Number	Birthday	Are we preparing a return for them?

If we are **not** completing your spouse's return, please provide their **gross income** so we can accurately calculate your tax benefits and deductions: \$_____

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Key Tax Information:

1. Residency & Status

- What is your status in Canada? Citizen Permanent Resident Work Permit Other: _____
- Did you move to Canada during the year? Yes No
 - *(If yes, date of entry:*

2. Foreign Assets & Investments

- Do you have a Canadian First Nation Status Certificate? Yes No
- Do you own assets outside of Canada (including foreign stocks) valued over \$10,000 CAD?
 Yes No

3. Government & Elections

- Do you authorize CRA to share your information with Elections Canada? Yes No

4. Home & Property Transactions

- Did you work from home during the year? Yes No
- Did you buy or sell a home in 2024? Yes No

5. Life Changes & Family Updates

- Did you experience major life changes? *(Check all that apply.)*
 Got married Got divorced/separated Had a child Other: _____
- Have you applied for the Disability Tax Credit (DTC)? Yes No

6. CRA Direct Deposit

- Do you want to set up direct deposit with CRA? Yes No Already done
 - *(If yes, please attach a void cheque or direct deposit form.)*

Key Income Information:

Check all that apply

Employment & Self-Employment Income:

- Salary/Employment (T4)
- Self-Employment (Provide Sole Proprietorship checklist or equivalent)
- Rental Properties (Provide rental income checklist or equivalent)

Retirement & Pension Income:

- Foreign Pension (Specify country & currency)
- RRSP/RRIF Withdrawals (T4RSP, T4RIF)
- Pension/Annuity Income (T4A, OAS)

Investment & Capital Income:

- Capital Gain/Loss (T5, Trading Summary)
- Dividends/Investment Income/Trust/Mutal Fund (T5, T3)

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Key Deduction and Credit Information:

(Check all that apply and attach supporting documents as indicated.)

Retirement & Investment Contributions

- RRSP Contributions *(Attach tax receipts – may include first 60 days of the current year.)*
- Home Buyers' Plan (HBP) or Lifelong Learning Plan (LLP) Withdrawals *(Provide amount & repayment details.)*
- Investment Income Expenses *(Attach interest expenses, fees, etc.)*

Housing & Moving Credits

- First-Time Home Buyers' Tax Credit *(Provide date of purchase.)*
- Moving Expenses (For Work/School, 40KM+ Relocation) *(Attach receipts & relocation details.)*
- Significant Home Renovations for Accessibility or Multi-Generational Homes *(Attach receipts or summary.)*

Employment-Related Deductions

- Union or Professional Dues *(Attach tax receipts.)*
- Employment Expenses *(See employment expenses checklist for allowable items)*
- Teacher School Supplies Credit *(Attach receipts.)*
- Tradesperson Tools & Relocation Costs *(Attach receipts.)*

Education & Training

- Student Loan Interest *(Attach tax receipts.)*
- Tuition Fees & Education Credits *(Attach T2202A tax slip.)*
- Did you attend any courses or training programs not reimbursed by your employer? *(If yes, attach receipts.)*

Family & Childcare Deductions

- Childcare & Camp Expenses *(Attach official receipts.) If camp or lessons are used in the place of childcare, they are eligible. Items like hockey registration are no longer claimable.*
- Adoption Expenses *(Attach receipts.)*
- Spousal Support Payments *(Attach proof of payments.)*

Medical & Charitable Deductions

- Medical Expenses *(Attach receipts. Contact your pharmacy or insurance provider for a summary. If claiming travel expenses, provide a summary of trips over 40KM one-way for medical purposes.)*
- Charitable Donations *(Attach official donation receipts – may include up to Feb 28th of the current year.)*
- Fertility Treatment Expenses *(Attach receipts for in vitro fertilization (IVF), intrauterine insemination (IUI), medications, or surrogacy-related costs.)*

Thank you for trusting us with your returns!