

Personal Income Tax Return

Returning Client Intake Form 2024



Contact Preferences:

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

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:	
Email:	
Phone Number:	

Key Tax Information:

1. Residency & Status
 - What is your status in Canada? Citizen Permanent Resident Work Permit
Other: _____
2. Foreign Assets & Investments
 - 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: _____
 - If we are **not** completing your spouse's return, please provide their gross income so we can accurately calculate your tax benefits and deductions: \$ _____
 - 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.)*

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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)

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.*)

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- 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.)*