

PERSONAL TAX INFORMATION SHEET

Taxpayer

Name: _____ SIN: _____

Date of Birth: (MM/DD/YYYY) _____ Phone: _____

Address: (including postal code) _____

Email: _____

Preferred method of communication: Phone Email

Canadian Citizen: Yes No Principal Residence Sale: Yes No

Elections Canada: Yes No Foreign Property over \$100,000: Yes No

US Citizen or Green Card Holder: Yes No

****Our firm does NOT do USA taxes**

Marital Status: Single Married Separated Divorced Widowed Common Law

If marital status has changed during the year, give date of change: (MM/DD) _____

Spouse (*please only fill out one form per couple*)

Name: _____

Spouse's net income: (if we do not prepare their return. **Line 23600**) _____

Date of Birth: (MM/DD/YYYY) _____ SIN: _____

Phone: _____ Email: _____

Canadian Citizen: Yes No Principal Residence Sale: Yes No

Elections Canada: Yes No Foreign Property: Yes No

US Citizen or Green Card Holder: Yes No

****Our firm does NOT do USA taxes**

Dependents

Name:	M/F	SIN:	Date of Birth:	Net Income:	Live with you:	Canadian Citizen:
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

For office use only:		Initial	Date
Client added to Doc.it?	<input type="checkbox"/>		
Client added to SAGE?	<input type="checkbox"/>		
Client added to T1 Tracker?	<input type="checkbox"/>		
Client added to Outlook?	<input type="checkbox"/>		

Please check all that apply. Include the supporting documents in your tax package.

Income	Check those that apply	Supporting Documents
Employment income	<input type="checkbox"/>	T4/T4A
Pension income	<input type="checkbox"/>	T4A
Old age security	<input type="checkbox"/>	T4A(OAS)
Canada Pension Plan	<input type="checkbox"/>	T4A(P)
Employment insurance	<input type="checkbox"/>	T4E
Social assistance and/or WCB	<input type="checkbox"/>	T5007
Contract income	<input type="checkbox"/>	T5018
RRSP income	<input type="checkbox"/>	T4RSP
RRIF income	<input type="checkbox"/>	T4RIF
Investment income	<input type="checkbox"/>	T3/T5/T5008
Partnership income	<input type="checkbox"/>	T5013
Self-employment	<input type="checkbox"/>	Summary
Rental income	<input type="checkbox"/>	Summary
Capital gains/losses	<input type="checkbox"/>	G/L summary
Foreign income	<input type="checkbox"/>	Slips/summary
Spousal support received	<input type="checkbox"/>	Summary/Agreement
Deductions		
RRSP contributions	<input type="checkbox"/>	RRSP receipts
Union/professional dues	<input type="checkbox"/>	Receipts
Investment fees	<input type="checkbox"/>	Summary
Child care expenses	<input type="checkbox"/>	Receipts
Moving expenses	<input type="checkbox"/>	Summary
Employment expenses	<input type="checkbox"/>	T2200 & receipts
Spousal support paid	<input type="checkbox"/>	Details/Agreement
Credits		
Disability tax credit	<input type="checkbox"/>	T2201
Tuition fees	<input type="checkbox"/>	T2200/TL11A
Student loan interest	<input type="checkbox"/>	Statement
Medical expenses	<input type="checkbox"/>	Receipts
Donations	<input type="checkbox"/>	Official receipts
Political contributions	<input type="checkbox"/>	Receipts
First time home buyer	<input type="checkbox"/>	Details