

New Client Information Sheet

| | | | |
|-------------|----------|--------------|----------|
| Date | | Referred by: | |
| New Client: | Yes / No | Change: | Yes / No |

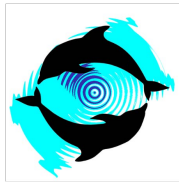
| CLIENT INFORMATION | | SPOUSE INFORMATION |
|--------------------|----------------|--------------------|
| | Name | |
| | Birthday | |
| | SIN # | |
| | Address | |
| | City/ Prov / | |
| | Home Phone | |
| | Fax | |
| | Office Phone | |
| | Mobile Phone | |
| | Email | |
| | Marital Status | |

CHILDREN'S INFO

| | | | | |
|----|------|--|----------|--|
| 1. | Name | | Birthday | |
| 2. | Name | | Birthday | |
| 3. | Name | | Birthday | |
| 4. | Name | | Birthday | |

BUSINESS INFO (please leave blank if you don't own a business)

| | |
|--------------------|--|
| Company Name | |
| Trade Name | |
| Mailing Address | |
| Industry | |
| Email | |
| Business Number | |
| Corp. Access # | |
| Incorporation Date | |
| Y/E Date | |
| GST | |
| PAYROLL | |



Personal Tax Checklist

Please provide us with any of the following items applicable to your situation for the tax year that you would like us to file for you:

- Your legal name, date of birth, address, and phone number
- Your spouse or common-law partner's name, date of birth, and SIN number
- Dependent children - names and dates of birth
- All T4 slips for employers
- All other income slips (T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF)
- Charitable / Political donations receipts
- Investment receipts (share buy and sell along with statement)
- RRSP tax receipts
- Health bills (pharmacy, massage, chiropractic, natural healing, dental, etc.) For the family if not claimed by spouse.
- Public Transit passes
- Childcare (nanny, daycare, school receipts, child tax credit...)
- Child support payments or alimony payments
- Tuition & Education amounts/tax receipts, interest paid on student loans
- Revenue Properties information if applicable
- Moving expenses if applicable
- Declaration of Conditions of Employment (T2200) and receipts for work expenses if you are not reimbursed for them
- Old Age Security and CPP benefits and other pensions and annuities
- Employment Insurance benefits, Workers' Compensation benefits, or Social Assistance payments if applicable
- Notice of Assessment for the last tax year filed and a copy of your tax filing for the previous year
- Any other tax-related correspondence from the government for the current year