

2018 PERSONAL TAX INFORMATION

Are you: an existing client OR a new client

Please complete BOTH SIDES of this form

1. Did you or your spouse hold foreign property (including real estate, securities traded on a foreign stock exchange, foreign bank accounts) that had a cost greater than \$100,000 at any time during 2018? Yes No
2. Did you sell your home in 2018? Yes No and/or in 2019? Yes No
3. Are you or your spouse a US citizen? Yes No
4. Marital status Single / Married / Divorced / Common Law (living together) / Separated / Widowed
5. Was there a change in marital status in 2018? Yes No If yes, date of change: _____
6. Did you have any new dependants in 2018? Yes No If yes, please give details on side 2.
7. Are any family members disabled OR are you a caregiver for a disabled person? Yes No
8. Are you or your spouse 65 years or older? Yes No

If you answered YES to question 7 and/or 8, please ask for an information package for the Home Accessibility Tax Credit (HATC).

Name: _____

Spouse's Name: _____

Your SIN: _____ Your birth date: _____

Spouse's SIN: _____ Spouse's birth date: _____

Are we preparing your spouse's return? Yes / No

Address: _____

City _____ Prov. _____ Postal Code _____

Home #: _____ Cell #: _____

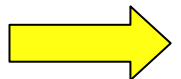
Work #: _____ Email: _____

Please check preferred means of contact above



MANDATORY

OVER



DEPENDANT INFORMATION

1. Name: _____ M/F S.I.N.: _____
Date of Birth: _____ Are we preparing their return? Yes/No
2. Name: _____ M/F S.I.N.: _____
Date of Birth: _____ Are we preparing their return? Yes/No
3. Name: _____ M/F S.I.N.: _____
Date of Birth: _____ Are we preparing their return? Yes/No

Do you authorize CRA to make your name available to update Elections Canada?

Yes No

NEW CLIENTS: Did you provide us with a copy of your prior year tax return?

Yes No

Are you currently enrolled for Direct Deposit? Yes No

If NO, please provide banking information.

If YES, did your banking info change in 2018? If YES, please provide NEW banking info.

Have you provided us with all information that is needed to complete this tax return?

Yes No

If no, what information is still needed?