

# C & V Income Tax Services Client Information Form

**Tax Year to be Filed** \_\_\_\_\_ Please fill out a form for each year  New Client  Prior Client

**Name** \_\_\_\_\_ **Social Insurance No.** \_\_\_\_\_

**Address** \_\_\_\_\_

**Home Phone** \_\_\_\_\_ **Cell Phone** \_\_\_\_\_ **Email** \_\_\_\_\_

**Date of Birth** \_\_\_\_\_ **Marital Status On Dec 31<sup>st</sup> of Tax Year** \_\_\_\_\_

**IF your Marital Status Change during the year:** **Date** \_\_\_\_\_ **Prior Status** \_\_\_\_\_

**Spouse's Name** \_\_\_\_\_ **Social Insurance No.** \_\_\_\_\_

**Spouse Date of Birth** \_\_\_\_\_

Are we preparing a return for your spouse  Yes  No

**IF No**, what was their Net Income \_\_\_\_\_

**IF Yes**, would you like to: Pension Split  Yes  No Family Tax Cut  Yes  No **\*\*if you qualify**

## Please List Each of Your Dependent Children

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Income \_\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Income \_\_\_\_\_

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Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Income \_\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Income \_\_\_\_\_

Are we preparing a return for any of your dependents  Yes  No **IF Yes**, list which ones

**Do you own any Foreign Assets OUTSIDE of Canada?**  Yes  No

**IF Yes**, What type of foreign asset? \_\_\_\_\_ Owned with Spouse  Yes  No

Where is the foreign asset located? \_\_\_\_\_ Value of the asset \_\_\_\_\_

Is there any income generated from this asset?  Yes  No **Total for Tax Year** \_\_\_\_\_

**Did you pay Rent or Property Tax during the year?**  Yes  No

**Total paid in the year** Rent \_\_\_\_\_ Prop Tax \_\_\_\_\_ **In which Province** \_\_\_\_\_

**Have you borrowed from your RRSP to buy a home or go back to school?**  Yes  No

**IF Yes** Home Buyers Repayment \_\_\_\_\_ Life Long Learning Repayment \_\_\_\_\_

**Does anyone pay or receive support payments?**  Yes  No **Court Order Dated** \_\_\_\_\_

**IF Yes**  Paid by \_\_\_\_\_ Spousal Amount \_\_\_\_\_ Child Amount \_\_\_\_\_

Received by \_\_\_\_\_ Spousal Amount \_\_\_\_\_ Child Amount \_\_\_\_\_

## Does anyone qualify for the following Credits?

Family Caregiver Amount? For whom \_\_\_\_\_

CCRA Approved Disability Credit? For whom \_\_\_\_\_

First Time Home Buyers Closing Date \_\_\_\_\_

Did you or your (C/L)spouse own a home since 2009?  Yes  No

Has anyone else claimed any amount towards the \$5000 credit?  Yes  No **If Yes** \$ \_\_\_\_\_

Healthy Homes Senior Home Renovation Tax Credit **Total Paid** \_\_\_\_\_

Renovations completed \_\_\_\_\_ **Date contracted** \_\_\_\_\_

**Did you pay any of these expenses for your children?**

- Child Care                       Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_  
If more than one child list amount per child \_\_\_\_\_
- Childrens Fitness Credit    Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_  
If more than one child list amount per child \_\_\_\_\_
- Ontario Activity Credit      Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_  
If more than one child list amount per child \_\_\_\_\_
- Arts Tax Credit                 Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_  
If more than one child list amount per child \_\_\_\_\_

**Did anyone pay tuition in the year?**  Yes  No \*\* T2202A must be attached

If the taxpayer is unable to use the full tuition  Carry Forward **OR**  Transfer to: \_\_\_\_\_  
Was the tuition reimbursed by anyone? By Whom \_\_\_\_\_ Amount \_\_\_\_\_

**Please Check Off Any Of The Following Items Paid thought the year**

- Charitable Donations                       Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_  
Did you or your (C/L)spouse claimed any donations since 2009?  Yes  No
- Interest on Student Loans                 Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_
- Medical Expenses                           Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_
- Public Transit Passes                       Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_
- Tax Paid By Installments                 Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_
- Union Dues / Professional Fees         Amount Paid \_\_\_\_\_ **OR**  Receipts Attached Qty \_\_\_\_\_

**Please Check Off Any Informations Slips You are Attaching and the Quantity of Each Slip**

- RC62 Qty \_\_\_\_\_  RRSP Qty \_\_\_\_\_  T2202A Qty \_\_\_\_\_  T3 Qty \_\_\_\_\_  T4 Qty \_\_\_\_\_
- T4A Qty \_\_\_\_\_  T4A(OAS) Qty \_\_\_\_\_  T4A(P) Qty \_\_\_\_\_  T4RIF Qty \_\_\_\_\_  T4RSP Qty \_\_\_\_\_
- T4E Qty \_\_\_\_\_  T5 Qty \_\_\_\_\_  T5007 Qty \_\_\_\_\_  T5008 Qty \_\_\_\_\_  T5013 Qty \_\_\_\_\_
- Other \_\_\_\_\_

**Please Check Off Any That Apply and Supply Addition Documents listed**

- Employment Expenses**  
Complete the Employment Expense worksheet found at [www.cvtaxservices.com/files/EmpExpWorksheet.pdf](http://www.cvtaxservices.com/files/EmpExpWorksheet.pdf)
- Final and Trust Returns**  
Complete the Trust and Estate checklist found at [www.cvtaxservices.com/files/FINALChklist.pdf](http://www.cvtaxservices.com/files/FINALChklist.pdf)
- Moving Expenses**  
Complete the Moving Expense worksheet found at [www.cvtaxservices.com/files/MovExpWorksheet.pdf](http://www.cvtaxservices.com/files/MovExpWorksheet.pdf)
- Post Bankruptcy Returns**  
A completed copy of your Pre Bankruptcy Return prepared by your Trustee.
- Rental Property**  
Complete the Rental Property worksheet found at [www.cvtaxservices.com/files/RentalWorksheet.pdf](http://www.cvtaxservices.com/files/RentalWorksheet.pdf)
- Self Employed Income**  
Complete the Business checklist found at [www.cvtaxservices.com/files/BusChklist.pdf](http://www.cvtaxservices.com/files/BusChklist.pdf)  
Complete the Business worksheet found at [www.cvtaxservices.com/files/BusWorksheet.pdf](http://www.cvtaxservices.com/files/BusWorksheet.pdf)

**Please Read and Sign**

The undersigned certifies that the information supplied here is complete and accurate. C&V Income Tax Services will prepare your tax return based on the information supplied here by the taxpayer. C&V Income Tax Services assumes no liability for errors occurred due to lack of information supplied or misrepresentation by the Taxpayer. The undersigned agrees to pay all fees for services upon completion. Overdue Accounts are subject to 2%/month interest charge (28.5%/annum) and after 90 days a collection administration charge of \$45 will be added to your account.

Signed \_\_\_\_\_ Dated \_\_\_\_\_