## 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	Socia	al Insurance No.
Address		
Home Phone	Cell Phone	Email
Date of Birth	Marital Status On Dec 3	31 <sup>st</sup> of Tax Year
IF your Marital Status Change duri	ng 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 🛛 Fan	nily Tax Cut 🛛 Yes 🔲 No **if you qualify
Please List Each of Your Depend	dent Children	
Name	Date of Birth	Income
		Income
Are we preparing a return for any o		
Where is the foreign asset located	?	☐ Yes ☐ No Owned with Spouse ☐ Yes ☐ No Value of the asset No Total for Tax Year
Did you pay Rent or Property Ta	• •	
Total paid in the year Rent	Prop Tax	In which Province
-		<b>jo back to school?</b>
		No Court Order Dated
		ount Child Amount
☐ Receivedby	Spousal Am	ount Child Amount
	For whom dit? For whom Closing Date e own a home since 2009 amount towards the \$500	9? □ Yes □ No 0 credit ? □ Yes □ No If Yes \$
Healthy Homes Senior Home R		
Renovations completed		_ Date contracted

□ Child Care       □ Amount Paid       OR       □ Receipts Attached Qty         If more than one child list amount per child       □ OR       □ Receipts Attached Qty         □ Childrens Fitness Credit       □ Amount Paid       OR       □ Receipts Attached Qty         □ If more than one child list amount per child       □ OR       □ Receipts Attached Qty       □         □ If more than one child list amount per child       □ OR       □ Receipts Attached Qty       □         □ If more than one child list amount per child       □ OR       □ Receipts Attached Qty       □         □ If more than one child list amount per child       □ OR       □ Receipts Attached Qty       □         □ If more than one child list amount per child       □ OR       □ Receipts Attached Qty       □         □ Receipts Attached Dattors       □ Amount Paid       ○ OR       □ Receipts Attached Qty       □         □ Plase Check Off Any Of The Following Items Paid thought the year       □ OR       □ Receipts Attached Qty       □	Did you pay any of these expenses for your children?	
□       Childrens Fitness Credit       □       □       OR       □ Receipts Attached Qy	Child Care Amount Paid OR Receipts Attached Qty	
If more than one child list amount per child       OR       Receipts Attached ory         If more than one child list amount per child       OR       Receipts Attached ory         Arts Tax Credit       Amount Paid       OR       Receipts Attached ory         If more than one child list amount per child       OR       Receipts Attached ory         If more than one child list amount per child       OR       Receipts Attached ory         If more than one child list amount per child       OR       Receipts Attached ory         If the taxpayer is unable to use the full tuition       Carry Forward OR       Transfer to:         Was the tuition reimbursed by anyone? By Whom       Amount       Amount         Please Check Off Any Of The Following Items Paid thought the year       OR       Receipts Attached ory         Did you or your (C/L)spouse claimed any donations since 2009?       Yes       No         Interest on Student Loans       Amount Paid       OR       Receipts Attached ory         Oublic Transit Passes       Amount Paid       OR       Receipts Attached ory         Itarest on Student Loans       Amount Paid       OR       Receipts Attached ory         Itarest ansit Passes       Amount Paid       OR       Receipts Attached ory         Itar Tansit Passes       Amount Paid       OR       Receipts Attached or	If more than one child list amount per child	_
□ Ontario Activity Credit       □ Amount Paid      OR       □ Receipts Attached Qy         If more than one child list amount per child      OR       □ Receipts Attached Qy      I         Arts Tax Credit       □ Amount Paid      OR       □ Receipts Attached Qy      I         If more than one child list amount per child      OR       □ Receipts Attached Qy      I         Did anyone pay tuition in the year?       Yes       No       ~TZ202A must be attached      I         If the taxpayer is unable to use the full tuition       □ Carry Forward OR       □ Transfer to:	Childrens Fitness Credit Amount Paid OR Receipts Attached Qty	
If more than one child list amount per child         Arts Tax Credit       Amount Paid         If more than one child list amount per child         Did anyone pay tuition in the year?       No         If the taxpayer is unable to use the full tuition       Carry Forward OR         Transfer to:		
□ Arts Tax Credit       □ Amount Paid      OR       □ Receipts Attached Qty         If more than one child list amount per child		
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       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         Public Transit Passes       Amount Paid       OR       Receipts Attached Qty         Tax Paid By Installments       Amount Paid       OR       Receipts Attached Qty         Interest on Student Loans       Amount Paid       OR       Receipts Attached Qty         Tax Paid By Installments       Amount Paid       OR       Receipts Attached Qty         It as Paid By Installments       Amount Paid       OR       Receipts Attached Qty         Union Dues / Professional Fees       Amount Paid       OR       Receipts Attached Qty         It as Qty       IT4A(QS) qty       IT4A(P) qty       IT4RSP Qty       IT4ASP Qty         It 4       Qty       IT4A(QS) qty       IT	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       Amount         Please Check Off Any Of The Following Items Paid thought the year       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         Wedical Expenses       Amount Paid       OR       Receipts Attached Qty         Public Transit Passes       Amount Paid       OR       Receipts Attached Qty         Union Dues / Professional Fees       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       T4A (Qty)       T5008 aty       T5013 aty       T5013 aty       T5013 aty       T5013 aty       T5013 aty<		
If the taxpayer is unable to use the full tuition □ Carry Forward OR □ Transfer to:         Was the tuition reimbursed by anyone? By Whom Amount	If more than one child list amount per child	_
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Was the tuition reimbursed by anyone? By Whom		
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       QR       Receipts Attached Qty         RC62       Qty       Qts       T44 Qty       T4A(QAS) Qty       T3 Qty       T4 Qty         T4A       Qty       T5 Qty       T5QO7 Qty       T5RO8 Qty       T4SO8 Qty       T5013 Qty         Other       T5       Qty       T5O07 Qty       T5008 Qty       T5013 Qty       T5013 Qty         Please Check Off Any That Apply and Supply Addition Documents listed       Employment Expenses       Complete the Employment Expense worksheet found at www.cvtaxservices.com/files/FINALChklist.pdf		
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       T4A Qty       T4A(P) Qty       T4RIF       Qty       T4A SP Qty         T44       Qty       T4A(OAS) Qty       T4A(P) Qty       T4RIF       Qty       T4ASP Qty         Other       T5       Qty       T5       Qty       T5       Qty       T5013 Qty         Please Check Off Any That Apply and Supply Addition Documents listed       Employment Expenses       Complete the Trust and Estate checklist found at www.cvtaxservices.com/files/FINALChklist.pdf       Moving Expenses       Complete the Moving Expense worksheet found at www.cvtaxservices.com/files/MovExpWorksheet.pdf	Was the tuition reimbursed by anyone? By Whom Amount	
Did you or your (C/L)spouse claimed any donations since 2009?       Yes       No         Interest on Student Loans       Amount Paid       OR       Receipts Attached dry         Medical Expenses       Amount Paid       OR       Receipts Attached dry         Public Transit Passes       Amount Paid       OR       Receipts Attached dry         Tax Paid By Installments       Amount Paid       OR       Receipts Attached dry         Union Dues / Professional Fees       Amount Paid       OR       Receipts Attached dry         Union Dues / Professional Fees       Amount Paid       OR       Receipts Attached dry         Union Dues / Professional Fees       Amount Paid       OR       Receipts Attached dry         Please Check Off Any Informations Slips You are Attaching and the Quantity of Each Slip       T4A dry       T4A dry       T4A (OAS) dry       T4A(P) aty       T3 qty       T4 Ray       T4 Ray         T4E       qty       T5 dry       T45007 qty       T5008 qty       T5013 qty       T5013 qty         Other		
□       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         □       Tax Paid By Installments       □       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         □       Union Dues / Professional Fees       □       Amount Paid       OR       □ Receipts Attached Qty         □       Union Dues / Professional Fees       □       Amount Paid       OR       □ Receipts Attached Qty       □         □       Union Dues / Professional Fees       □		
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Public Transit Passes Amount Paid OR Receipts Attached Qiy   Tax Paid By Installments Amount Paid   Union Dues / Professional Fees Amount Paid   OR Receipts Attached Qiy   Please Check Off Any Informations Slips You are Attaching and the Quantity of Each Slip   RC62 Qty   RC62 Qty   T4A Qty   Qt4 T4A   Qty T4A(QAS)   Qty T4A(P)   Qty T4RSP   Qty T4A(P)   Qty T4RSP   Qty T4A(P)   Qty T4RSP   Qty T5   Qty T5007   Qty T5008   Qty T5013   Qty T5008   Qty T5013   Qty T5008   Qty T5013   Qty T5008   Qty T5013   Qty T5013   Qty Qtataservices.com/files/EmpExpWorksheet.pdf     Please Check Off Any That Apply and Supply Addition Documents listed    Employment Expenses   Complete the Employment Expense worksheet found at <a href="https://www.cvtaxservices.com/files/FINALChklist.pdf">www.cvtaxservices.com/files/FINALChklist.pdf   Moving Expenses   Complete the Moving Expense worksheet found at <a href="https://www.cvtaxservices.com/files/RentalWorksheet.pdf">Rental Property   Complete the Rental Property   Complete the Rental Property worksheet found at <a href="https://www.cvtaxservices.com/files/BusChklist.pdf">www.cvtaxservices.com/files/BusChklist.pdf   Complete the Busines</a></a></a>		
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Please Check Off Any Informations Slips You are Attaching and the Quantity of Each Slip         Check Off Any Informations Slips You are Attaching and the Quantity of Each Slip         Check Off Any       Check Off Any         T4A       Check Off Any         T4A       Check Off Any         T4E       Check Off Any That Apply and Supply Addition Documents listed         Employment Expenses         Complete the Employment Expense worksheet found at <a href="www.cvtaxservices.com/files/EmpExpWorksheet.pdf">www.cvtaxservices.com/files/EmpExpWorksheet.pdf</a> Final and Trust Returns         Complete the Moving Expenses worksheet found at <a href="www.cvtaxservices.com/files/EnpExpWorksheet.pdf">www.cvtaxservices.com/files/EnpExpWorksheet.pdf         Post Bankruptcy Returns         A complete the Moving Expense worksheet found at <a href="www.cvtaxservices.com/files/EnpExpWorksheet.pdf">www.cvtaxservices.com/files/EnpExpWorksheet.pdf</a>         Post Bankruptcy Returns         A complete the Moving Expense worksheet found at <a href="www.cvtaxservices.com/files/RentalWorksheet.pdf">www.cvtaxservices.com/files/RentalWorksheet.pdf</a>         Self Employed Income       Complete the Business checklist found at <a href="www.cvtaxservices.com/files/BusChklist.pdf">www.cvtaxservices.com/files/BusChklist.pdf</a>         Complete the Business worksheet found at <a href="www.cvtaxservices.com/files/BusChklist.pdf">www.cvtaxservices.com/files/BusChklist.pdf</a>         Complete the Business worksheet found at <a empexpworksheet.pdf"="" files="" href="wwww.cvtaxservices.&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;RC62       aty       RRSP       aty       T2202A       aty       T3       aty       T4       aty         T4A       aty       T4A(OAS)       aty       T4A(P)       aty       T4RIF       aty       T4RSP       aty         T4E       aty       T5       aty       T5007       aty       T5008       aty       T5013       aty         Other       T5       aty       T5007       aty       T5008       aty       T5013       aty         Please Check Off Any That Apply and Supply Addition Documents listed       Employment Expenses       Complete the Employment Expense worksheet found at &lt;a href=" http:="" www.cvtaxservices.com="">www.cvtaxservices.com/files/EmpExpWorksheet.pdf         Final and Trust Returns       Complete the Trust and Estate checklist found at <a href="http://www.cvtaxservices.com/files/FINALChklist.pdf">www.cvtaxservices.com/files/FINALChklist.pdf         Moving Expenses       Complete the Moving Expense worksheet found at <a href="http://www.cvtaxservices.com/files/MovExpWorksheet.pdf">www.cvtaxservices.com/files/MovExpWorksheet.pdf         Post Bankruptcy Returns       A complete dopy of your Pre Bankruptcy Return prepared by your Trustee.       Rental Property         Complete the Rental Property worksheet found at <a href="http://www.cvtaxservices.com/files/BusChklist.pdf">www.cvtaxservices.com/files/BusChklist.pdf</a>         Self Employed Income       <td< td=""><td>Union Dues / Professional Fees 🔲 Amount Paid OR 🔲 Receipts Attached Qty</td><td></td></td<></a></a></a></a>	Union Dues / Professional Fees 🔲 Amount Paid OR 🔲 Receipts Attached Qty	
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<ul> <li>Other</li></ul>		
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Self Employed Income     Complete the Business checklist found at <u>www.cvtaxservices.com/files/BusChklist.pdf</u> Complete the Business worksheet found at <u>www.cvtaxservices.com/files/BusWorksheet.pdf</u>		
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	Complete the Business worksheet found at <u>www.cvtaxservices.com/files/BusWorksheet.pdf</u>	
Please Read and Sign	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.