

C & V Income Tax Services Client Information Form

Tax Year(s) to Be Filed _____ New Client Prior Client

Name _____ Social Insurance Number _____

Address _____

Province of Residence on December 31st : _____

Home Phone _____ Cell Phone _____ Email _____

Date of Birth _____ Marital Status on Dec 31st of Tax Year _____

IF Marital Status Changed During the Year: Date _____ Prior Status _____

Are you a Canadian Citizen? Yes No Did you immigrate or emigrate in the year? Entry Date _____

Were you incarcerated for more than 90 days in the year? Yes No Exit Date _____

Spouse Information

Spouse's Name _____ Social Insurance Number _____

Spouse Date of Birth _____

Are we preparing a return for your spouse with this submission Yes NO

If NO, what was their Net Income _____

If YES, would you like to Pension Split Yes NO *** If applicable

Please List Each of Your Dependent Children

Name _____	Date of Birth _____	Income _____
Name _____	Date of Birth _____	Income _____
Name _____	Date of Birth _____	Income _____
Name _____	Date of Birth _____	Income _____
Name _____	Date of Birth _____	Income _____

Are we preparing a return for any of your dependants Yes NO If Yes, list which ones _____

Did you pay Rent or Property Tax during the year? Yes NO In Which Province: _____

Total Paid In the Year Rent _____ Property Tax _____

Student Residence Fees _____ Hydro On the Reserve _____

Do you own any Foreign Assets OUTSIDE of Canada that exceed \$100,000? Yes NO

IF YES What type of Asset? _____ Owned with Spouse? Yes NO

Country of Asset? _____ Cost of Asset? _____ Income From Asset: _____

Did you purchase or sell a home this year? Purchased Sold Owned with Spouse? Yes NO

If you Sold a home - Full Address: _____

Total Sale Amount \$ _____ Sale Date _____ Year Purchased _____

If you Bought a home - Date of Closing? _____

Did you or your spouse own a home in the past 5 years? Yes NO

Has anyone else claimed any amount toward the \$10,000 Credit? Yes NO If YES \$ _____

Does anyone pay or receive support payments? Yes NO

<input type="checkbox"/> Paid By _____	Spousal Amount \$ _____	Child Amount \$ _____
<input type="checkbox"/> Received By _____	Spousal Amount \$ _____	Child Amount \$ _____

Did anyone pay tuition in the year? Yes NO ** Must attach T2202

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 mark off any of the following credits or deductions

- CRA Approved Disability Credit for _____
- Charitable Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Child Care Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Educator Supply Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Home Accessibility Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Medical Expenses Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Senior Public Transit Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Student Loan Interest Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Tax Paid By Installments Amount Paid \$ _____ **OR** Receipts Attached Qty _____
- Union Dues Amount Paid \$ _____ **OR** Receipts Attached Qty _____

RRSP Purchased: First 60 days of Tax Year Mar - Dec of Tax Year First 60 day after Tax Year

Did you open a FTHSP this Year? Yes NO FTHSP Contribution Slip

Please Check off Any Information Slips You Are Attaching and the Quantity of Each Slip

- T2202A Qty _____ T4A Qty _____ T4E Qty _____ T4RSP Qty _____ T5008 Qty _____
- T3 Qty _____ T4A(OAS) Qty _____ T4PS Qty _____ T5 Qty _____ T5013 Qty _____
- T4 Qty _____ T4A(P) Qty _____ T4RIF Qty _____ T5007 Qty _____ RC210 Qty _____

- Employment Expenses** Complete the worksheet here: <https://www.cvtax.ca/resources/employment-expense-worksheet/>
- Final and Trust Returns** Complete the worksheet here: <https://www.cvtax.ca/resources/final-and-trust-return-checklist/>
- Moving Expenses** Complete the worksheet here: <https://www.cvtax.ca/resources/moving-expense-worksheet/>
- Rental Property** Complete the worksheet here: <https://www.cvtax.ca/resources/rental-property-worksheet/>
- Self Employed Income** Complete the worksheet here: <https://www.cvtax.ca/resources/business-return-worksheet/>

Additional Information: _____

How would you like to pay for your services? E-Transfer In Office Pay @ Door

How would you like your return delivered to you? Email In Office Curbside Pick Up

Are you interested in an Instant Refund if you qualify? Yes No ** You must come into the office to pick up a cheque

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.

Find The Complete Price Structure Here: <https://www.cvtax.ca/tax-services/>

Signed _____ Dated _____