

## 2017 PERSONAL TAX INFORMATION

Are you: an existing client OR a new client

**Please complete 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 2017? Yes No
2. Did you sell your home in 2017? Yes No
3. If you/your spouse owe taxes this year, will you be paying using online banking? Yes No
4. Are you or your spouse a US citizen? Yes No
5. Marital status (circle one): Single Married Divorced Common Law (living together) Separated Widowed
6. Was there a change in marital status in 2017? Yes ~~Yes~~ No ~~No~~ If yes, date of change:
7. Did you have any new dependents in 2017? Yes No If yes, please give details on page 2.
8. Are you a Teacher or Early Childhood Educator? Yes No
9. Are any family members disabled OR are you a caregiver for a disabled person? Yes No
10. Are you or your spouse 65 years or older? Yes No

*If you answered YES to question 8 and/or 9, 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 enter preferred means of contact above. **EMAIL is MANDATORY**

**DEPENDENT 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

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. Please enter info below.

If YES, did your banking info change in 2016? 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? Please enter info below.