

New Client Personal Tax Information

Please fill out this form when submitting your personal taxes.

Personal Information

Tax Payer

Name _____

SIN _____

Date of Birth _____

Address _____

Postal code _____

Phone _____

Email _____

Canadian Citizen YES NO

Spouse/Common-Law

Name _____

SIN _____

Date of Birth _____

Address _____

Postal Code _____

Phone _____

Email _____

Canadian Citizen YES NO

Marital Status: Single Married Common-Law Divorced Separated Widowed

Did your marital status change during the year? YES NO

If yes, indicate change and date of change: _____

Dependents

1

2

3

4

Name	_____	_____	_____	_____
Date of Birth	_____	_____	_____	_____
Relationship	_____	_____	_____	_____
SIN	_____	_____	_____	_____

Please answer the following questions YES or No. If yes, provide information.

Yes ____ No ____	Do you want to sign up to receive email from CRA?
Yes ____ No ____	Do you want CRA to provide your information to Elections Canada?
Yes ____ No ____	Are you a US citizen?
Yes ____ No ____	Do you have assets outside of Canada of more than CAN\$100,000
Yes ____ No ____	Did you live in a prescribed northern zone for a period of 6 consecutive months?
Yes ____ No ____	Has your direct deposit changed or do you want to start direct deposit? If so, include a void cheque.
Yes ____ No ____	Do you or a family member have a disability certificate? Ask us for details if you think you or a dependent may qualify.

Braden Tidball

CHARTERED PROFESSIONAL ACCOUNTANT

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CHARTERED PROFESSIONAL ACCOUNTANT

Review and check all appropriate boxes, provide slips/receipts.

Income Items

Credits/Deductions

	T3	Trust income, mutual funds		Employment expenses (Attach T2200)
	T4	Employment Income		Union or professional dues
	T4A	Other income, pension income		Family medical expenses
	T4AOAS	Old Age Security		Tuition slips (Attach T2202A)
	T4AP	Canada Pension		Donations
	T4RSP	RRSP Income		RRSP Contributions
	T4RIF	RIF Income		First time home buyer
	T4E	Employment insurance		Alimony/Maintenance paid
	T5	Interest, Dividends		Political donations
	T5013	Partnership income		Child care
	T5007	WCB Benefits and social assistance		Interest paid to earn investment income
	T5018	Subcontractor		Student loan interest forms
		Rental Income and expenses		Moving expenses - 40 km closer to work/school
		Farming Income and expenses		Tradesperson tools and expenses
		Self employed income and expenses		Tax installments paid
		Capital gains and losses		Investment counsel
		Alimony/Maintenance received		Automobile expenses
		Sale of stocks, bonds, real estate, etc		Home office expenses
		Other		Home Accessibility expenses
				Educator School Supplies
				Digital News Subscription
				Other

Drop off at our office. Open Monday to Friday 8:30-4:30

60A Riel Drive , St Albert, AB T8N 4A3

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