

|                 |     |         |        |   |
|-----------------|-----|---------|--------|---|
| TPS #           |     |         |        |   |
| T1013 signed    | 1   | 2       | 3      | 4 |
| 3rd Pty Consent | 1   | 2       | 3      | 4 |
| Photo ID        | 1   | 2       | 3      | 4 |
| Files Set up    | TPS | Profile | Folder |   |

# NEW CLIENT INTAKE

|             | Relationship | Last Name | First Name | S I N # | Date of Birth |
|-------------|--------------|-----------|------------|---------|---------------|
| Taxpayer    | <i>Self</i>  |           |            |         |               |
| Spouse      |              |           |            |         |               |
| Dependent 1 |              |           |            |         |               |
| Dependent 2 |              |           |            |         |               |

## PERSONAL & CONTACT INFORMATION

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/Prov/PC: \_\_\_\_\_

Home: \_\_\_\_\_

Work: \_\_\_\_\_

Cell: \_\_\_\_\_

Other: \_\_\_\_\_

Email: \_\_\_\_\_

## OTHER INFORMATION

YES / NO Did marital status change during this tax year? *Married Common Law Divorced Separated Widow Single*

If yes provide date (mm / dd / yyyy) \_\_\_\_\_

YES / NO Were you a resident of BC at Dec 31? If not, where? \_\_\_\_\_

YES / NO Are you a Canadian Citizen? If not, where? \_\_\_\_\_

YES / NO Are you a U.S. Citizen?

YES / NO Previous year (or most recently filed) personal income tax return notice of assessment(s) provided?

YES / NO Are you set up for DD banking? Do you want to be? If so provide details.

YES / NO Provide information to Elections Canada? If "yes" you are authorizing us to transfer your basic information (name, address & DOB only) from CRA to Elections Canada to keep the voters list up-to-date

YES / NO RRSP-HBP w/draw or repmt? \$ \_\_\_\_\_ RRSP - Lifelong Learning repmts? \$ \_\_\_\_\_

YES / NO Tax installments?

YES / NO Did you own foreign property at any time during the tax year costing more than CAN \$100,000.

If "yes" please provide details \_\_\_\_\_

YES / NO Foreign Tax Returns Filed? If yes provide details.

YES / NO Did you incur any Capital Gains during the tax year? If yes provide details.

YES / NO Did you sell a principal residence during the tax year? If yes provide details.

YES / NO Have you ever claimed capital gains exemptions? Business Investment Loss?

If "yes" please provide details \_\_\_\_\_

YES / NO Did you purchase any significant capital assets during the year which may appreciate in value?

If "yes" please provide details and copies of documents \_\_\_\_\_

YES / NO In 1994 did you have investment property on which you may have elected to report a capital gain?

If "yes" please provide details and copies of the T664 \_\_\_\_\_

YES / NO Did you have any non-registered investments? If "yes" please provide the necessary documents

YES / NO Internet Business Activities? If yes provide details \_\_\_\_\_

YES / NO Would you like to receive our email newsletters?

Whom may we thank for your referral or how did you hear about us? \_\_\_\_\_