Deakin
CPA | Professional Corporation

Client Information Sheet

Personal Information

☐ Returning Client - enter only new information

NAME		DATE OF BIRTH	SIN #
		MM/DD/YYYY	
EMAIL	HOME PHONE	CELL PHONE	CANADIAN CITIZEN
			☐ Yes ☐ No
MARITAL STATUS ON DEC. 31ST: ☐ Single ☐ Married ☐ Common-Law ☐ Separated ☐ Divorced ☐ Widowed			
MARITAL STATUS CHANGED? ☐ Yes ☐ No		OWN $100,000+ OFFOREIGN PROPERTY? ☐ Yes ☐ No	
PAPERLESS RETURN AND/OR NOA? ☐ Yes ☐ No		SOLD YOUR RESIDENCE DURING TAX YEAR? ☐ Yes ☐ No	

Spouse (if applicable)

☐ Returning Client - enter only new information

NAME		DATE OF BIRTH	SIN #
		MM/DD/YYYY	
EMAIL	HOME PHONE	CELL PHONE	CANADIAN CITIZEN
			☐ Yes ☐ No

Address

STREET ADDRESS			PROPERTY TAX PAID	ANNUAL RENT
			$	$
CITY	PROVINCE	POSTAL CODE	NAME OF LANDLORD OR MUNICIPALITY	

Dependants

NAME	RELATIONSHIP	DATE OF BIRTH	SIN #
		MM/DD/YYYY	
		MM/DD/YYYY	
		MM/DD/YYYY	
		MM/DD/YYYY	

Applicable Income, Deductions and Credits (check all that apply)

☐ Business Income	☐ Legal Fees (support related)	☐ Caregiver
☐ Rental Income	☐ Child Care Expenses	☐ Disability Tax Credit
☐ Sale of Investments	☐ Moving Expenses (work or school)	☐ Medical Expenses
☐ Sale of Real Estate	☐ Spousal Support Received/Paid	☐ Charitable or Political Donations
☐ Employment Expenses (T2200)	☐ RRSP Contributions	☐ TFSA
☐ Professional/Union Dues	☐ Tuition Fees	☐ _____
☐ Legal Fees (employment related)	☐ Student Loan Interest	

Comments

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