



SOUTH

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NORTH

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Taxation Year: _____

Please note that personal tax returns are due by April 30. Please drop off your documents and information slips as soon as possible so that we can file your tax return before the due date. We cannot guarantee that the tax return will be filed before the due date if information is received after April 15, 2020, but we will try our best to file it on time.

PERSONAL INFORMATION

Your Name: _____ Email address: _____

Primary Contact Telephone #: _____ Cell #: _____ Other#: _____

Address: _____ City: _____

Postal code: _____ Province of residence at December 31st: _____

Did you move in 2019? Yes _____ No _____ Did you dispose of your principle residence? Yes _____ No _____

If province of residence has changed from prior year, please provide date of change: _____

If the following information is the same as last year and you are NOT a new client, please go to the questions marked with *.

Your Date of Birth: _____ Your S.I.N.# _____

Marital status at December 31st _____ Date of any change to your marital status _____

Spouse's Name: _____ Date of Birth: _____ S.I.N.# _____

If we are not preparing your spouse's tax return, please provide his/her net income for the year \$ _____

Is anyone permanently disabled? _____ Has a T2201 (Disability Tax Credit Certificate) been filed? _____

| <u>Dependant Name(s)</u> | <u>Date of Birth</u> | <u>Relationship</u> | <u>S.I.N.#</u> | <u>Income</u> |
|--------------------------|----------------------|---------------------|----------------|---------------|
| | | | | |

For your Canadian T1 Individual Income Tax Return - ALL questions MUST be completed:

* Has your direct deposit information changed? _____ Yes _____ No
 - If yes, please provide Bank Account # _____ Transit # _____ (5 digits) Bank ID # _____ (3 digits)

* Do you want to set up your direct deposit information if you haven't set it up before?
 - If yes, please provide Bank Account # _____ Transit # _____ (5 digits) Bank ID # _____ (3 digits)

* Are you a Canadian citizen? _____ Yes _____ No *Are you a US citizen? _____ Yes _____ No

* Do you authorize CRA to give only your name, address and date of birth to Elections Canada? _____ Yes _____ No

* Did you become or ceased to be a resident of Canada during the year? _____ Yes _____ No Date: _____

* Did you own any assets outside Canada **AT ANY TIME** during the year with a cost in excess of \$100,000 (Canadian) _____ Yes _____ No
 - Answer NO if you only had personal-use vacation property that did not generate rental income.

* Did you pay personal tax instalments to CRA this year? _____ Yes _____ No Installment Total \$ _____

I have disclosed all sources of income earned this year for preparation of this tax return.

Signature: _____

Date: _____