

## CLIENT INTAKE FORM

At Rose Tax & Accounting Service we strive to provide our clients with the best and most comprehensive return as possible. Please complete this form to ensure that we have everything we need.

**Appointments:** You will be notified when your return is ready to be reviewed. We highly recommend a 20-minute appointment to go over the results of your return.

I would like my appointment to be: ☐ In Office ☐ By Phone ☐ By Video ☐ Only View & Sign electronically

**Retention of Documents:** All documents you provide will be scanned into the TaxDome client portal for retention & referral. Once scanned, all documents will be shredded following guidelines under the Public Services & Procurement Canada (PSPC) Contract Security Program.

☐ Please shred my documents once scanned into my client portal in TaxDome.

☐ Please return all documents to me. I understand that if they are not picked up within 90 days from the date provided, they will be shredded as above.

## CLIENT INFORMATION

Name: \_\_\_\_\_ DATE OF BIRTH \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (yyyy/mm/dd) SIN: \_\_\_\_\_

Current Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Spouse/Common-law/Dependant - Connected family members, if applicable. **Any information provided on behalf of other individuals must be done so in accordance with PIPA.**

Name: \_\_\_\_\_ DATE OF BIRTH \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (yyyy/mm/dd) SIN: \_\_\_\_\_

Name: \_\_\_\_\_ DATE OF BIRTH \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (yyyy/mm/dd) SIN: \_\_\_\_\_

Please complete:

- Did you move in 2023? Yes ☐ No ☐
  - 2023 Address: \_\_\_\_\_
- Did you have a change in marital status? Yes ☐ No ☐
  - Married ☐ Living Common-Law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single ☐
  - Date of Marital Status change - Month \_\_\_\_ Day \_\_\_\_
- Do you have dependants? New baby? Changes to custody? Are you currently, or were you a caregiver? This can include family members who are not living with you.
  - ☐ Add Dependant ☐ Remove Dependant ☐ Add Caregiver credit ☐ Remove Caregiver Credit
- Do you, or a family member have a Disability Tax Credit on file? No ☐ Yes ☐ If yes, who with?  
\_\_\_\_\_
- Do you own any foreign real estate or investments that were worth more than \$100,000 at any time in 2023? ☐ Yes ☐ No
- Did you sell a property in 2023? ☐ Yes ☐ No

## INCOME

- ☐ Income from employment, Pension, or other sources, such as cash jobs or tips.
- ☐ Investment income – Please supply the full package from your investment company.
- ☐ Foreign Income from Employment, Pension, Investments, or other sources.
- ☐ Spousal or Child Support Received
  - ☐ Child Support Received \_\_\_\_\_
  - ☐ Spousal Support Received \_\_\_\_\_
- ☐ Self-employment – Please complete the self-employment expense sheet.
- ☐ Rental property – Please complete the rental income expense sheet.

## DEDUCTIONS

- ☐ RRSP's
- ☐ First Home Saving Account (FHSA)
- ☐ Union Dues or Professional Fees
- ☐ Spousal or Child Support Paid
  - ☐ Child Support Paid \_\_\_\_\_
  - ☐ Spousal Support Paid \_\_\_\_\_
  - ☐ Is your agreement registered with CRA? Yes ☐ No ☐
- ☐ Employment Expenses
  - ☐ T2200 – must be completed & signed by your employer is required to claim any expense.
  - ☐ TL2's – must be completed & signed by your employer is required to claim any expense.
  - ☐ Travel logs are required to claim auto expenses. Please complete the Auto expense work sheet.
- ☐ Investment or Financial Management Fees
- ☐ Moving expenses if more than 40km for school or NEW employment
- ☐ Childcare expenses

## CREDITS

- |  |   |
|--|---|
| <input type="checkbox"/> Medical expenses                  | <input type="checkbox"/> Home accessibility                                 |
| <input type="checkbox"/> Charitable or Political Donations | <input type="checkbox"/> Adoption expenses                                  |
| <input type="checkbox"/> Rent or Property tax              | <input type="checkbox"/> Volunteer firefighter or Search & Rescue volunteer |
| <input type="checkbox"/> Tuition or tuition transfer       | <input type="checkbox"/> Digital news subscription                          |
| <input type="checkbox"/> Student loan interest             |   |
| <input type="checkbox"/> First time home buyer             |   |

At Rose Tax Service we have a zero-tolerance policy for intimidation, abuse, harassment, or violence towards any member of our team. We work in a mutually respectful environment and try to provide service that is fair, equal, and non-discriminatory. We expect our clients to be forthright and truthful, not withholding pertinent information to creating an accurate and valid return. Be advised that we are obligated by law to include any legal requirements that are indicated during any communication. A breach of these policies can result in termination from this practice.

☐ I agree to the terms of these policies.

☐ All information provided above is true and accurate to the best of my knowledge.

Signature \_\_\_\_\_ Date \_\_\_\_\_