

## Personal Income Tax Intake Form and Checklist

### Personal Information:

- Full Name: \_\_\_\_\_
- Date of Birth: \_\_\_\_\_
- Social Insurance Number (SIN): \_\_\_\_\_

### Marital Status

(Single, Married, Common Law, Divorced, Widowed, Separated)

- Any change in Marital Status Recently: \_\_\_\_\_
- Spouse/Partner's Information (Name, SIN, Net Income of the year, Date of Birth)  
(Name, SIN, Net Income of the year, Date of Birth)
- Address: \_\_\_\_\_
- Email Address: \_\_\_\_\_
- Phone Number: \_\_\_\_\_

### Dependents:

- Do you have any dependents? (Yes/No)
  - Full Name: \_\_\_\_\_
  - Date of Birth: \_\_\_\_\_
  - Social Insurance Number (SIN): \_\_\_\_\_
  - Disability status (if applicable) \_\_\_\_\_
- Have you or your dependents attended post-secondary education? (Yes/No)
  - Details of tuition or education expenses (T2202 form) \_\_\_\_\_

### Income Information

Check off all that applies and provide relevant forms:

- ☐ Employment Income (T4)
- ☐ Self-employed Income (Provide records/summary)
- ☐ Pension Income (T4A, T4A(OAS), T4A(P), T4RSP)
- ☐ Investment Income (T5, T3)
- ☐ Rental Income (Provide summary of Income and Expenses)
- ☐ Employment Insurance Benefits (T4E)
- ☐ Social Assistance or Worker's Compensation (T5007)
- ☐ Other Income (E.g., Foreign Income, Scholarships)

## **Deductions and Credits**

Provide supporting documents where applicable:

- ☐ RRSP Contribution (Receipts)
- ☐ Childcare Expenses
- ☐ Union Dues
- ☐ Medical Expenses
- ☐ Charitable Donations (Receipts)
- ☐ Moving Expenses (for a qualifying relocation)
- ☐ Interest on Student Loans
- ☐ Home Office Expenses (Employment or Self-employed)
- ☐ Provide summary of expenses and T2200 (for employees)
- ☐ Other deductions (E.g., spousal support payments, investment fees)

## **Investment Property**

1. Did you sell or dispose of investment, real estate, or other property during the year?  
If yes, provide details of the transactions (T5008, Proceeds for disposition, Cost, date of sale)
2. Did you own or hold foreign property worth more than \$100,000 CAD at any time during the year?  
If yes, complete form T1135

## **Tax Instalments and other payments:**

1. Did you make any tax instalment payments during the year?  
Provide proof of payment
2. Are you claiming any provincial tax credits (E.g., Ontario Trillium Benefit, BC Climate Action Tax Credit)

## **Miscellaneous:**

1. Are there any other financial activities or significant life changes (E.g., marriage, divorce, job change) that might impact your taxes?
2. Do you want to sign up for direct deposit or update your direct deposit information?

## **Signature and Date:**

I confirm that the information provided is accurate to the best of my knowledge.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_