



New Client Intake - Personal Tax



A1 Accounting & Business Solutions Inc./Calgary EZ Tax Inc.
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Personal & Contact Information

Legal Name:		Spouse's Name:	
SIN:	M/F	SIN:	M/F
Date of Birth:	DD/MM/Year	Date of Birth:	DD/MM/Year
Citizenship Status:		Citizenship Status:	
Which year(s) are we filing?		Which year(s) are we filing?	
Phone:		Alt. Phone:	

Home Address:

Postal Code: _____ **Email Address:** _____

Marital Status: Single Common-Law Married Separated Divorced Widowed

If we are **NOT** filing your spouse's personal tax return, please provide your spouse's income for each year you would like us to file:

Did you move in the last year? Yes No

If different from above, provide the address where you lived as of December 31 for the year(s) being filed.

How would you like to receive your returns (choose one) Paper Electronic

Legal Names of Dependant Children (under 18)	Gender	Date of Birth
		DD/MM/Year
		DD/MM/Year

Are you caring for a dependant adult or senior citizen? **Y/N** If yes, provide details below

If you are separated or divorced, who is claiming the eligible dependant children?
(childcare expenses, amount for children under the age of 6 years old)

I am submitting: Self-employment income Is GST required (if you are self-employed) **Y/N**

<input type="checkbox"/> Rental Income	<input type="checkbox"/> Moving Expenses	<input type="checkbox"/> Public Transit Receipts or Passes
<input type="checkbox"/> Medical Receipts	<input type="checkbox"/> RRSP Contributions	<input type="checkbox"/> T2202A (Post-secondary education)
<input type="checkbox"/> Child Care Expenses	<input type="checkbox"/> Child Fitness Receipts	<input type="checkbox"/> Home Buyers Plan/Life Long Learning

Do you have tuition or education amounts being **transferred** from your spouse or children? **Y/N**

Do you own property valued over \$100,000 outside of Canada? **Y/N** If yes, provide details

Did you sell a personally owned residential property during the tax year? **Y/N** If yes, provide details

Please provide us with any other notes or details you feel are important here:

Use other side if needed

Internal Use Only

File received by: _____ Date: _____

This client is: A1 Accounting Calgary EZ Tax Edmonton Trail Copperfield

How did the client hear about us?

Additional Notes/Questions/Items for follow up: