CloutierMatthews
Chartered Professional Accountants

New Personal Client

PERSONAL INFORMATION

Full Name	S.I.N.	Birthdate (yyyy/mm/dd)	Citizenship
Apt./Suite – Building Number Street Name, City, Postal Code			Marital Status
Phone:	Cell:	Fax:	Email:

Are you or any of your family members: 1) Physically or mentally impaired? YES ☐ NO ☐ 2) A Northern Resident? YES ☐ NO ☐

SPOUSE INFORMATION

Full Name:	S.I.N.	Birthdate (yyyy/mm/dd)	Citizenship:

DEPENDENT INFORMATION

Full Name – Child 1		Birthdate (yyyy/mm/dd)	Citizenship:
Gender (for tax purposes):	S.I.N.	Attended Post-Secondary Education? YES ☐ NO ☐ *If yes, please attach T2202A*	
Full Name – Child 2		Birthdate (yyyy/mm/dd)	Citizenship:
Gender (for tax purposes):	S.I.N.	Attended Post-Secondary Education? YES ☐ NO ☐ *If yes, please attach T2202A*	
Full Name – Child 3		Birthdate (yyyy/mm/dd)	Citizenship:
Gender (for tax purposes):	S.I.N.	Attended Post-Secondary Education? YES ☐ NO ☐ *If yes, please attach T2202A*	

Is there a shared custody agreement for the above dependents? YES ☐ NO ☐

For additional children, please attach another worksheet.

QUESTIONNAIRE

1. Did your **marital status** change during the tax year? Date of change YES ☐ NO ☐
2. Did you or your spouse **change names** during the tax year? YES ☐ NO ☐
3. Did you or your spouse earn **rental or self-employment** income during the tax year? YES ☐ NO ☐
4. Did you **move over 40 km** in the tax year for a new job or business? YES ☐ NO ☐
5. Did you or your spouse **buy or sell a home** during the tax year? YES ☐ NO ☐
6. Did you or your spouse **hold any investments** during the tax year? YES ☐ NO ☐
7. Did you or your spouse pay any **employment expenses**, that were not reimbursed by your employer, during the year? YES ☐ NO ☐
8. Additional detail:

Please turn to back of page for Tax Checklist

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TAX CHECKLIST

GENERAL INFORMATION

☐ Signed T1 Engagement Letter
☐ Notice of (re)assessment for prior year
☐ Income tax instalments paid
☐ Direct deposit information (blank cheque)
☐ Spouse's net income
☐ Eligible dependent's income
☐ Alimony/maintenance paid or received
☐ Disability certificate (T2201)
☐ Tax shelters
☐ Other:

EMPLOYMENT AND PENSION INCOME

☐ Employment T4 or T4A slips
☐ Pension T4A, T4OAS, or T4AP slips
☐ Employment insurance slips
☐ Employment and commission expense receipts/details
☐ T2200 Employer authorization for expenses
☐ Automobile expenses (if eligible) **(worksheet online)**
☐ Other:

SELF-EMPLOYMENT INCOME

☐ Self-employment income and expenses **(worksheet online)**
☐ Business use of home expenses **(worksheet online)**
☐ Automobile expenses (if eligible) **(worksheet online)**
☐ Other:

INVESTMENT INCOME

☐ RRSP contribution slips
☐ RRSP, DPSP, RPP, RRIF, RESP withdrawal slips
☐ Interest/dividends/capital gains T5/T5013 slips
☐ Estates/trusts/mutual fund T3 slips
☐ Other investments T5013/T5008 slips
☐ Summary of gains and losses
☐ Interest paid on non-registered investments
☐ Investment counsel fees
☐ Mutual fund investment summary statements
☐ Foreign income and foreign tax paid
☐ List of foreign properties owned (Cost over $100,000)
☐ Other:

REAL ESTATE AND RENTAL INCOME

☐ Rental income and expenses **(worksheet online)**
☐ Change in use of property (principal residence to/from rental property)
☐ Sale of real estate – Lawyer statement of adjustments
☐ Sale of real estate – Details (incl. principal residence)

TAX DEDUCTIONS AND CREDITS

☐ Charitable donation receipts (Indicate if gift "in-kind")
☐ Political donation receipts
☐ Medical expense receipts/details
☐ Moving expense receipts/details
☐ Child care expense receipts/details (incl. names & SIN of recipients)
☐ Tuition fees paid (T2202A – signed by student)
☐ Tuition amounts transferred from a child
☐ Student loan interest statements
☐ Union/professional dues
☐ Accounting fees paid
☐ Other: