



OLAFSON & JONES

Personal Income Tax Information Sheet for New Clients

Important: If possible, please provide a copy of your Notice of Assessment or prior year's Personal Income Tax Return and, if applicable, the latest Instalment Payment Summary.

Please complete the below form, review the checklist to ensure all applicable slips have been provided and sign the attached Authorization Request.

Client Information

Full Name: _____

Primary phone number: _____ Secondary phone number: _____

Email address: _____

HOW WOULD YOU LIKE TO RECEIVE THE CLIENT COPY OF YOUR RETURN

I will sign and pick up in person (*Paper copy*) I will electronically sign and receive an electronic package

Date of Birth: _____ Social Insurance Number (SIN): _____

Are you a Canadian citizen? _____ If you answered no, please indicate country of citizenship _____

Current Home Address

Number: _____ Unit # _____ Street _____

City: _____ Province: _____ Postal Code: _____

1) Has your primary residence changed in 2023? YES NO

Date of move: _____ Street Address _____

City: _____ Province: _____ Postal Code: _____

Are you a first-time Home Buyer? YES NO

If you owned previously: Sale price \$ _____ Original Year of purchase: _____

Current Marital Status

Circle one: Single Common-Law Married Separated Divorced Widowed

2) Did your marital status change in 2023? YES NO

If you answered yes, please indicate the date of change: _____

3) If you are married or common-law and we are NOT PREPARING your partner's return, please complete their information below:

Full legal name: _____ SIN: _____

Date of Birth: _____ Taxable income for 2023: \$ _____

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Dependents: If applicable please list their full legal names, dates of birth and SINS of all children and/or dependents

Foreign Income Verification Statement (T1135)

5) At any time in 2023, did you hold foreign property with a value of over \$100,000? YES NO

Self Employment

6) Are you a sole proprietorship (self-employed, NOT incorporated)? YES NO

7) Are you registered to file G.S.T? YES NO

If you answered yes, please provide your access code (if applicable) and business number

Business number: _____ Access code: _____

Work From Home

9) At any time in 2023, did you work from home? If yes, *please complete page 3* YES NO

Notes: _____



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Indicate the area used for work purposes in (Sq ft)	Total Sq ft of home

Eligible Expenses	Claimed? (Y/N)	Amount
Rent paid for a house or apartment where you live		
Electricity, heat, water or the utilities portion of your		
Home internet access fees		
Maintenance (minor repairs, cleaning supplies, light		
Supplies (stationery items, pens, folders, sticky notes,		
Employment use of a basic cell phone plan		
Long distance calls for employment purposes		

Eligible Expenses for Commission Employees ONLY	Claimed? (Y/N)	Amount
Property Taxes		
Home Insurance		
Lease of a cell phone, computer, laptop, tablet, fax		



CANADIAN INCOME TAX CHECKLIST

PERSONAL SLIPS

- All Statement of Income (T4)
- Pension, Retirement, annuity and other income (T4A)
- Statement of Trust Income (T3)
- Statement of Investment Income (T5)
- Statement of CPP Benefits (T4AP)
- Old Age Security Pension (OAS) (T4AOAS)
- Statement of Securities Transactions (T5008)
- Workers' Compensation Benefits / Social Assistance payment (T5007)
- Statement of RRSP Income (T4RSP)
- Statement of Income From a Registered Retirement Income Fund (T4RIF)
- Statement of Partnership Income (T5013)
- Statement of Employment Insurance Benefits (T4E)
- Foreign Income/ Pension
- Statement of Rental Income & Expenses or Form T776

RECEIPTS & TAX CREDITS

- Charitable donations
- Child care expenses
- Children's fitness programs
- Medical expenses
- Political contributions
- Professional and/or Union dues
- Registered Retired Savings Plan (RRSP)
- Student loan interest statement
- Investment Expenses (Interest, Fees, etc.)
- Tool expenses (apprentice mechanics & tradesperson)
- Home buyer's tax credit
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Custody Arrangement / support payment documentation/ copy of agreement
- Capital gains/losses records
- Tuition / Education (T2202A)
- Vehicle / Travel Logbooks & Expenses

ADDITIONAL DOCUMENTATION

- Instalment payment summary
- Notice of Assessment / Reassessment
- GST Form
- Any CRA Correspondence
- Sale of principle resident information:
 - Year of purchase
 - Sale amount
 - Date of sale
- Other: _____

Authorization/Cancellation request – Signature page

- Print this page and have it signed and dated by the taxpayer or legal representative
- Retain a copy of the signed and date signature page in your files for six years from the date that this information is transmitted to the CRA. Do not send the signature page by mail or fax unless request to do so.

Representative information

REP ID <input type="text"/>	First name : _____	Last name: _____
Group ID <input type="text"/>	Group name _____	
Business number (BN) <input type="text" value="829399955"/>	Business name (BN) <input type="text" value="Olafson & Jones"/>	

Taxpayer information

SIN <input type="text"/>	First name: _____	Last name: _____
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Authorization information

Level of authorization:	<input type="text" value="Level 2"/>
Expiry date:	<input type="text"/>

Cancellation information

Cancel all representatives

Cancel specific representative

Rep ID <input type="text"/>	First name : _____	Last name: _____
Group ID <input type="text"/>	_____	
Business number (BN) <input type="text"/>	Business name (BN) _____	

Signature information

Legal representative signature

Name of taxpayer or legal representative:

Certification

By signing and dating this page, you authorize the Canada Revenue Agency to interact with and/or cancel the representative(s) mentioned above.

Signature:

Signature of taxpayer or legal representative

Date:
