



OLAFSON & JONES

Personal Income Tax Information Sheet for Returning Clients

CLIENT NAME: _____

DATE SUBMITTED: _____

HOW MANY RETURNS ARE WE PREPARING: _____

TAX YEAR(S): _____

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

If you answered yes, please provide:

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: _____

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

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

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: \$ _____

4) Did you have any children in 2023 or 2024? YES NO

If you answered yes, please provide the date of birth: _____

Full legal name: _____

5) Are you a sole proprietorship (self-employed, NOT incorporated) and 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: _____

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

7) At any time in 2023, did you work from home? If yes, please see page 2 YES NO

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

I will sign and pick up in person (*Paper copy*)

I will sign electronically and receive an electronic copy

Cell phone number: _____ Secondary phone number: _____

Email address: _____



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Please complete the below form only if you worked from home in 2023

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 condominium fees		
Home internet access fees		
Maintenance (minor repairs, cleaning supplies, light bulbs, paint etc.)		
Supplies (stationery items, pens, folders, sticky notes, postage, toner, ink cartridge, etc.)		
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 machine, etc.		

Notes: _____
