OLAFSON & JONES
Personal Income Tax Control Sheet

CURRENT CLIENT

ELECTRONIC DELIVERY? **YES** ☐ **NO** ☐

DATE SUBMITTED:_____

How many returns are we preparing?_____ Year(s)? _____

Client Name: _____

1) Has your primary residence changed in 2023? Yes ☐ No ☐

If yes, please provide your date of move: _____

Prior address: _____

New address: _____

If you owned previously: Sale price $ _____ and Original Year of Purchase: _____

2) Did your marital status change in 2023? Yes ☐ No ☐

If yes, please indicate the date and type of change: _____

3) Have you had any children in 2023 or 2024? Yes ☐ No ☐

If yes, please provide the date of birth: _____

Full name: _____

4) At any time in 2023, did you hold foreign property with a value of over $100,000.00? Yes ☐ No ☐

5) If you are married or common law and we are **NOT preparing** your spouse's return, please fill out below:

Full legal name:_____

Date of Birth: _____ SIN:_____

Taxable income for 2023: $_____

CONTACT INFORMATION:

Primary phone number: _____ (cell / home / work) Cellphone

Secondary phone number:_____ (cell / home / work) Cellphone

Email: _____

** NEW** POTENTIAL ADDITIONAL FILING REQUIREMENTS:

Should you answer "yes" to any of the following, we will contact you for further information.

- Did you jointly own residential real estate (other than your principal residence or a personal use cottage) in 2022? If so, you may have a UHT filing requirement. Yes ☐ No ☐
- Do any of the following situations apply to you? If so, you may have a T3 trust filing requirement.
  - You are listed on a parent or child's bank account Yes ☐ No ☐
  - You are on title for a parent or child's house Yes ☐ No ☐
  - You have "In Trust For" (ITF) accounts for children/grandchildren Yes ☐ No ☐

Olafson & Jones
Personal Income Tax Control Sheet

Current Client

Notes for preparer