



# 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: \$ \_\_\_\_\_

*Continued...*



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

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### 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?<br>(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?<br>(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<br><input type="text"/>                                 | First name :<br>_____  | Last name:<br>_____ |
| Group ID<br><input type="text"/>                               | Group name<br>_____  |                     |
| Business number (BN)<br><input type="text" value="829399955"/> | Business name (BN)<br><input type="text" value="Olafson &amp; Jones"/> |                     |

### Taxpayer information

|                          |                   |                  |
|--------------------------|-------------------|------------------|
| SIN <input type="text"/> | First name: _____ | Last name: _____ |
|--------------------------|-------------------|------------------|

### Authorization information

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

### Cancellation information

|   |                             |                     |
|---|-----------------------------|---------------------|
| <input type="checkbox"/> Cancel all representatives     |                             |                     |
| <input type="checkbox"/> Cancel specific representative |                             |                     |
| Rep ID<br><input type="text"/>                          | First name :<br>_____       | Last name:<br>_____ |
| Group ID<br><input type="text"/>                        |                             |                     |
| Business number (BN)<br><input type="text"/>            | Business name (BN)<br>_____ |                     |

### Signature information

|   |
|---|
| <input type="checkbox"/> Legal representative signature |
| Name of taxpayer or legal representative:<br>_____      |

### 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:<br><input checked="" type="checkbox"/> _____<br>Signature of taxpayer or legal representative |
| Date:<br>_____   |