



OLAFSON & JONES

Personal Income Tax Information Sheet for New Clients

FOR OFFICE USE ONLY: Electronic file: Saved in Client Files/iFirm Client Portal **DATE SUBMITTED:** _____

HOW MANY RETURNS ARE WE PREPARING?: _____ TAX YEAR(S): _____

IMPORTANT: We require authorization from Canada Revenue Agency to complete your return(s). Please refer to page 3 for detailed instructions

Client Information

FULL NAME: _____ Phone Number: _____

Email: _____

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

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

Current Home Address

Suite: _____ Number: _____ Street _____

City: _____ Province: _____ Postal Code: _____

Mailing Address (if different from home address)

Suite: _____ Number: _____ Street _____

City: _____ Province: _____ Postal Code: _____

Current Marital Status

Circle one: Single Common-Law Married Separated Divorced Widowed

1) Has your primary residence changed in 2025?

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: _____

Did you receive the Manitoba Homeowners Affordability Tax Credit (HATC) on your 2025 Property Tax bill?

YES

NO

If you answered no, **please provide a copy of your 2025 Property Tax Bill** to apply for the HATC on your 2025 Income Tax Return

2) Did your marital status change in 2025?

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 2025: \$ _____



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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.

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

4) At any time in 2025, did you hold foreign property with a value of over \$100,000?	YES	NO
Includes foreign investments or foreign income producing properties		

5) Are you self-employed (NOT incorporated)?	YES	NO
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6) If yes, are you registered to file G.S.T?	YES	NO	Are we preparing a return for you?	YES	NO
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If you answered yes, please provide your access code (if applicable) and business number

Business number: _____ Access code: _____

7) Did you work from home more than 50% of the time in 2025? If yes, please provide the following	YES	NO
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Signed T2200 from your employer ☐

Electricity/heat _____

Square footage the office/area used for work purposes _____

Internet _____

Total square footage of home _____

Water _____

Rent _____

Maintenance (specific to the space) _____

If you are a commission employee, please also provide the following annual expenses

Property taxes _____ Home Insurance _____

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 via **DocuSign** and receive an electronic copy

Please note that each client must have their own email address to sign via **DocuSign.**

Notes: _____



Canada Revenue Agency Authorization

Adding An Authorized CRA Representative

To add Olafson & Jones as an authorized representative for your personal account with the Canada Revenue Agency, please complete one of the following options:

Option 1

STEP 1: Log into your CRA My Account. If you do not yet have a My CRA Account, you can register by following the steps on CRA's website

* Please note, before starting the process to create a My CRA Account, you will need access to the following information:

- Social Insurance Number (SIN)
- Date of Birth
- Your most recently filed and assessed tax return (within the last 2 years)
- Valid form of ID (e.g., driver's license, passport)

STEP 2: On the left hand side navigation menu, select profile

STEP 3: Select "View Authorized Representatives" to view all current representatives

STEP 4: Select "Authorize New Representative

STEP 5: Select "Start", then enter our business number — 82939 9955

STEP 6: Select "Authorization level 2"

STEP 7: Once confirmed, you should then see Olafson & Jones listed as an authorized representative on your account



Canada Revenue Agency Authorization

Adding An Authorized CRA Representative

To add Olafson & Jones as an authorized representative for your personal account with the Canada Revenue Agency, please complete one of the following options:

Option 2

- STEP 1:** Complete the next page and submit to our secure portal. You will be asked to provide the following information:
1. Full name (as on file with CRA)
 2. Social Insurance Number (SIN)
 3. Date of Birth
 4. Your most recent notice of assessment (that is at least 6 months old)
- STEP 2:** Once we have this information, we will generate an authorization form that we will return to you for signature
- STEP 3:** Please sign & return a copy of the signed form to our office
- STEP 4:** We will file the form with CRA to add Olafson & Jones as authorized representatives

Should you have any questions about this process, please contact our office at (204) 338-5972 or admin@olafsonjones.ca and we would be pleased to assist.

Sincerely,

Olafson & Jones

Chartered Professional Accountants Inc.



Canada Revenue Agency Authorization

Adding An Authorized CRA Representative

Please only complete the below form if you have opted for Option 2

Full name (as on file with Canada Revenue Agency)

Social Insurance Number (SIN)

Date of Birth (Month/Day/Year)

Please attach your most recent notice of assessment (that is at least 6 months old) to your file submission.



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Personal Income Tax Checklist

PERSONAL INCOME SLIPS

Please review the checklist below to ensure all applicable documents are submitted

	T4 - All Statement of Income
	T4A - Pension, Retirement, annuity and other income
	T3 - Statement of Trust Income
	T5 - Statement of Investment Income
	T4AP - Statement of CPP Benefits
	T4A(OAS) - Old Age Security Pension
	T5008 - Statement of Securities Transactions
	T5013 - Statement of Partnership Income
	T5007 - Social Assistance Payment

	T4RSP - Statement of RRSP Income
	T4RIF - Statement of Income from a Registered Retirement Income Fund
	T4E - Statement of Employment Insurance Benefits
	Any foreign income/pension
	Rental Property Income, expenses, purchases & sales
	Capital Gain/losses schedule
	Other income _____
	Other income _____

RECEIPTS & TAX CREDITS

	Charitable donations
	Child care expenses
	Children's fitness programs
	Medical expenses
	Political contributions
	Professional and/or Union dues
	Investment Expenses (Interest, Fees, etc.)
	Tool expenses (apprentice, mechanics and tradesperson)
	Moving expenses must be greater than 40km Please provide all receipts and indicate distance moved and for what purpose
	If you are claiming home office indicate: Area used for work purposes _____ Sq ft

	Home Buyer's tax credit
	Disability Tax Credit Certificate
	Declaration of Conditions of Employment (Form T2200)
	Custody Arrangement and Copy of Agreement/ Support Payments Documentation
	Tuition and Enrolment Certificate (Form T2202/ T2202A)
	Vehicle/Travel Logbooks and Expenses
	If you are a teacher, indicate the amount spent on school supplies in the year \$_____
	Rent *only one person per household can claim
	Adoption expenses and receipts
	Other _____

Notes: _____