



OLAFSON & JONES

Personal Income Tax Control Sheet

CURRENT CLIENT

<p>ELECTRONIC DELIVERY? YES NO</p> <p>DATE SUBMITTED: _____</p> <p>How many returns are we preparing? _____ Year(s)? _____</p>
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Client Name: _____

1) Has your primary residence changed in 2021? 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 martial status change in 2021? Yes No

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

3) Have you had any children in 2021 or 2022? Yes No

If yes, please provide the date of birth: _____

Full name: _____

4) Did you work from home 50% of the time over a period of at least four consecutive weeks? Yes No

If yes, has your employer provided form T2200 Declaration of Conditions of Employment? Yes No

If no, how many days did you work from home? _____

5) At any time in 2021, did you hold foreign property with a value of over \$100,000.00? Yes No

6) 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 2021: \$ _____

<p>CONTACT INFORMATION:</p> <p>Primary phone number: _____ Type: _____</p> <p>Secondary phone number: _____ Type: _____</p> <p>Email: _____</p>
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