



Existing Client

Name: [] Date: []

Were you born outside of Canada? [] Where, if yes? []

Please check the box if you are you a Canadian citizen? []

As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors? []

Your authorization is valid until you file your next return. This information will be used only by Elections Canada for purposes permitted under the Canada Elections Act.

Please check if, in 2011, you owned more than \$100,000.00 of foreign property? ** []

This includes Foreign Mutual Funds/Investments

Do you have any of the following income sources:

- [] Self Employed
[] Rental (property)
[] Mary Kay

Did your address and/or your phone number change in 2011 or 2012? If yes, Please update below? Please update email address as well. If not, Please initial in box []

Home Address: []
City: [] Prov [] Postal Code []

Home Phone: [] Email address: []
Work Phone: [] Mobile Phone: []

When is the best time to reach you, and at what number? []
Are you picking up or should we mail your return? []

Did your marital status change in 2011? If yes, Please update below?

Marital Status: [] Married [] Divorced [] Common Law [] Separated [] Widowed [] Single
If not, Please initial in box []

Date, if status changed in 2011: []

Spouse Information:

Name []
SIN: []
Date of Birth (yyyy-mm-dd): []

Please check if we are preparing spouse's return? [] If No, Spouse's Line 236 \$ []

Do you pay rent or property taxes? Please circle one Rent or Taxes
Please provide receipts and/or the following information
(if you normally qualify for the provincial tax credit or if you are unsure)

Address []
Months []
Total Amount Paid []
Landlord or Municipality []



Existing Client

Please update the information below:

RRSP deduction limit: (Please provide us with a copy of your Notice of Assessment)

Please check if you pay personally for a medical plan? (eg. Liberty Health)

Please check if you have medical receipts?

Do you have any of the following (include receipts)?

- | | |
|---|--|
| <input type="checkbox"/> Child Care Expense | <input type="checkbox"/> Safety Deposit Box |
| <input type="checkbox"/> Charitable Donations | <input type="checkbox"/> Salesperson's Expense |
| <input type="checkbox"/> Moving Expenses | <input type="checkbox"/> Tuition Payments |
| <input type="checkbox"/> Professional Dues | <input type="checkbox"/> Union Dues |
| <input type="checkbox"/> Ontario Children's Activity Tax Credit | <input type="checkbox"/> Ontario Senior Homeowners' Property Tax Grant |
| <input type="checkbox"/> Children's Fitness Amount | |

Have there been any additions to your family or has a child started or still in Post Secondary Education in 2011? If yes, please fill in chart below.

If not, Please initial in box				
Children (under 19) Name	Date of Birth (yyyy-mm-dd)	Post Secondary Student? (Y/N)	Carry Tuition Fwd to: (or N/A)	Net Income Line 236

Have student attach copy of T2202A slip (or TL11A if university is outside Canada).

Please check if your children had income in 2011?

Tuition Transfer: Parent Or Child

Address of Child(ren), if renting: Landlord's Name:
Include Postal Code

Check if a tax return is needed? if yes please have child fill out separate form

If you want to change how you received your refund from last year.

Please check the appropriate box.

Would you like your tax refund / HST?	<input type="checkbox"/> mailed to you	<input type="checkbox"/> Direct deposit to your bank	Please check if you would like your Child Tax Credit direct deposited?	<input type="checkbox"/>
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** Please include a void cheque for direct deposit

Please initial if, your banking information has not changed and we can direct deposit to the account on file.

Please check if you made any installment payments for 2011?

Total Amount Paid

To whom shall we bill (Name or Company)? If different from the name on return

Please check if we have permission to give information about your return to other family members?

How did we receive the Return Information? Mail, In Person, Fax or Email?

Please check, would you like to meet with Marion to go over your tax return when it is complete?