



New / Returning Client

Name: [] Date: []

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

Have we ever prepared your return before? Yes or No: []
If yes, what was the last year we prepared? []
If new Client, How did you hear about us? []

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

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? []

Date of Birth (yyyy-mm-dd): []
Social Insurance Number (SIN): []

Marital Status: [] Married [] Divorced
[] Common Law [] Separated
[] Widowed [] Single

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 \$ []

RRSP deduction limit: [] (Please provide a copy of your Notice of Assessment)



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Table with 5 columns: 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 child(ren) had income in 2011? Tuition Transfer: Parent Or Child

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

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

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

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)? Child Care Expense, Charitable Donations, Moving Expenses, Professional Dues, Ontario Children's Activity Tax Credit, Children's Fitness Amount, Safety Deposit Box, Salesperson's Expense, Tuition Payments, Union Dues, Ontario Senior Homeowners' Property Tax Grant

** Please include a void cheque for direct deposit **

Would you like your tax refund / HST? mailed to you Direct deposit to your bank Please check if you would like your Child Tax Credit direct deposited?

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?