Clear Form

THE TAX GUY

New Client Information

1. Name: (Exactly as used by CRA in letters to you)

   _____

2. Address:

   _____ _____ _____ _____
   Street & Number City/Town Province Postal Code

3. Telephone: _____

4. Birthdate: _____ _____ _____
   Day Month Year

5. SIN: _____

6. Marital Status (on Dec.31st): ◯ Single ◯ Married ◯ Common Law ◯ Separated ◯ Divorced ◯ Widowed

   Did your Marital Status change in 2023? ◯ Yes ◯ No Date of change: _____ _____
   Day Month

7. Spouse's Name:

   _____

8. Spouse's Birthdate:

   _____ _____ _____
   Day Month Year

9. Spouse's SIN: _____

10. Dependants (name, birthdate, gender, SIN if available):

    _____ _____

    _____ _____

    _____ _____

11. 1st time home buyer in 2023? ◯ Yes ◯ No

12. Sell any property in 2023? ◯ Yes ◯ No (if "yes", then we will speak about details)

Please make sure you also have the following information ready:

13. Receipt for rent paid *or* property tax paid in 2023. Name of Municipality or Landlord.
14. Childcare expense info (daycare)
15. Medical expenses receipts
16. Charitable donation receipts
17. Direct Deposit banking info if you want refunds deposited into your account (Bank, Branch, Account)