



OLAFSON & JONES

Personal Income Tax Information Sheet

New Client

ELECTRONIC DELIVERY?	YES	NO
DATE SUBMITTED: _____		
How many returns are we preparing? _____ Year (s)? _____		

Please fill out below:

Full Name: _____

Address: _____

Has your primary residence changed in 2019? YES NO

If yes, please provide your: date of move: _____

New address: _____

Sale price and year of purchase (if you owned previously) _____

Main phone number: _____ Type: _____

Secondary phone number: _____ Type: _____

Email: _____

Preferred method of contact (circle one): **Main phone number** **Secondary phone number** **Email**

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

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

Marital Status: Single Common - Law Married Separated Divorced Widowed

Did your marital status change during the 2019 taxation year? Yes No

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

(continued...)



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Important : If possible, please provide a copy of your **Notice of Assessment** or **Personal Income Tax Return** from the prior year and, if applicable, the latest Instalment Payment Summary. We also require you to **sign a T1013 (Authorizing a Representative)**. This authorizes our firm to confidentially access your account information through the Canada Revenue Agency.

If applicable

Spouse's Name: _____

Spouse's Date of Birth: _____ SIN: _____

If we are not preparing a return for your spouse or common — law partner, please provide the net income amount from his/her return : _____

If applicable Please list the full names, dates of birth and SINs of all children and / or dependents:

Are you self employed? Yes No

If yes - Do you use a home office for your business? Yes No

What is the area of home used for business (sq. feet): _____

What is the total area of the home (sq. feet): _____

- Are you registered to file G.S.T? Yes No

- Are we preparing a G.S.T. return for this taxation year? Yes No

- Have you provided us with the following slips? Please check all that apply:

_____ Hydro _____ Insurance _____ Maintenance _____ Mortgage Interest _____ Property Taxes

Have you provided us a copy of your Notice of Assessment or Personal Income Tax Return from the prior year? Yes No

Notes to preparer:

Please sign the CRA Authorizing a Representative form attached to this form