



INCOME TAX SERVICE LTD.



105 - 3631 Chatham Street | Richmond | BC | V7E 2Z1 | Tel: 604-241-7595

Date: _____ New Client Referred by _____

Name _____	Date of Birth _____
Address _____	Marital Status on Dec. 31, 2016:
Phone _____	Married Widowed
Cell Phone _____	Divorced Common Law
Email Address _____	Separated Single
Spouse _____	Date of any changes _____
	Date of Birth _____

Efiling is mandatory unless CRA says otherwise **Are we preparing 1 or 2 Returns**

Are you a **Canadian citizen**? YES ___ NO ___

Do you wish **CRA** to transfer your name, address & birthdate to **Elections Canada** to update the voters' list? YES ___ NO ___

At any time, in 2016, did you own foreign property or have foreign investments valued at more than \$100,000? YES ___ NO ___

Do you have **Direct Deposit** in place or has your **Direct Deposit** information changed?
 If **NO** to the 1st question or **YES** to the 2nd, please include a VOID cheque or a Direct Deposit form from your Bank.

Do you qualify for the **Disability Tax Credit**? (must be approved by CRA) Self _____ Spouse _____

Dependents			Non Refundable Credits	
Name	Relationship	Birthdate	Volunteers	Select one
			Firefighters	Teacher who coaches
			Search & Rescue	
			New Refundable Credit	
			Teachers/classroom supplies - receipts needed	

Please include receipts for all child care expenses. Also, remember to include receipts for extracurricular activities to be eligible for the Fitness Tax Credit (up to \$500) and the Arts Tax Credit (up to \$250)

Medical Expenses **Alimony** Paid (deductible) \$ _____ Received (taxable) \$ _____

Quarterly Instalments Paid in 2016? Self _____ Spouse _____

Do you wish to split your income? YES NO Split saved?

Direct Deposit Information: Branch # Institution: Account #

Remarks:

Please include ALL slips & Notice of Assessment. Additional charge to redo returns. NSF Cheques - \$50.00 charge.

Office Use Only: Prepared by _____ Time _____ Date _____ 2017

Amount Charged: _____ Accepted _____ Returned to Client _____