



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

Date: \_\_\_\_\_ New Client  Referred by \_\_\_\_\_

Name _____		Spouse Name _____	
Date of Birth _____		Date of Birth _____	
Address _____ _____		Marital Status on Dec 31, 2023:	
Home Phone _____		Married	Divorced
Cell Phone _____		Common-law	Separated
Email address _____		Widowed	Single
		Date of any changes _____	
Are you a Canadian citizen?		YES	NO
Can CRA give your information to Elections Canada to update the voters' list?		YES	NO
Did you sell Property in 2023 eligible for the <b>Principal residence exemption?</b> In 2023,		YES	NO
Did you own <b>foreign property</b> or <b>investments</b> valued > \$100,000?		YES	NO
<b>Non Refundable Credits (Check all that apply)</b>			
Disability Tax Credit (Self or spouse)	Tuition	Student Loan Interest	
Charitable Donations	Volunteer Firefighters/Search and Rescue		
Medical Expenses	First-time Home Buyers		
Digital News Subscription	Teachers - classroom supplies		
<b>Dependants</b>			Child care expenses Spousal support <i>Paid (deductible)</i> \$ _____ <i>Received (taxable)</i> \$ _____
<b>Name</b>	<b>Son\Dtr</b>	<b>Birthdate</b>	
<b>Tax Deductions (Check all that apply)</b>			
RRSP contributions	Work from home due to COVID-19:		
Home Buyer's Plan	Lifelong Learning Plan	Flat rate	Detailed method (T2200s req'd)
Union/professional dues	Employment expenses (T2200)		
Investment fees			
<b>Quarterly Instalments</b> Paid in 2023?	Self \$ _____	Spouse \$ _____	
Did you receive a <b>foreign pension?</b>	YES	NO	
Do you wish to <b>split</b> your <b>pension income?</b>	YES	NO      Saved \$ _____	
<b>Remarks:</b> _____			
Please include ALL slips & <b>Notice of Assessment</b> . Additional fee to redo returns. NSF Cheques - \$50 charge If required, please attach a VOID cheque or a <b>Direct Deposit</b> form from your Bank.			

Office Use Only: Prepared by \_\_\_\_\_ Time \_\_\_\_\_ Date \_\_\_\_\_, 2024  
Amount Charged: \_\_\_\_\_ Accepted \_\_\_\_\_ Returned to Client \_\_\_\_\_