



#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, 2022:	
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 2022 eligible for the Principal residence exemption ?		YES	NO
In 2022, did you own foreign property or investments valued > \$100,000?		YES	NO
Non Refundable Credits (Check all that apply)			
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		
Dependants			Child care expenses Spousal support <i>Paid (deductible)</i> \$ _____ <i>Received (taxable)</i> \$ _____
Name	Son\Dtr	Birthdate	
Tax Deductions (Check all that apply)			
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			
Quarterly Instalments Paid in 2022?	Self \$ _____	Spouse \$ _____	
Did you receive a foreign pension ?	YES	NO	
Do you wish to split your pension income ?	YES	NO Saved \$ _____	
Remarks: _____			
Please include ALL slips & Notice of Assessment . Additional fee to redo returns. NSF Cheques - \$50 charge If required, please attach a VOID cheque or a Direct Deposit form from your Bank.			

Office Use Only: Prepared by _____ Time _____ Date _____, 2023
Amount Charged: _____ Accepted _____ Returned to Client _____