



CLIENT INFORMATION FORM

 514-945-2825
 info@TandemTax.ca
 TandemTax.ca

First Name _____ Last Name _____

E-mail Address _____

Canadian citizen? _____ Did you arrive in the past year? _____

Date Arrived (YYYY/MM/DD) Full _____

Mailing Address _____
Please include apt#, city, province, and postal code

Phone _____ Male _____ Female _____

SIN _____ Date of Birth (YYYY/MM/DD) _____

Marital Status _____

If marital status changed during the year, please indicate the date of change: _____

Spouse or Common-Law Partner's Information (if applicable)

Are we preparing your spouse's or common-law partner's return? _____ If not, please indicate their net income:
 Federal line 236 _____

First Name _____ Quebec line 275 _____

Last Name _____ Male _____ Female _____

SIN _____ Date of Birth (YYYY/MM/DD) _____

Email Address _____ Canadian citizen? _____

Dependant(s) Information (if applicable)

First & Last Name	Date of Birth	SIN (if applicable)	Net Income

Receipts from daycare of educational institution for information about services provided and amounts paid.

Name address and social insurance number of individual providing child care services

OTHER INFORMATION

1. Did you own foreign property at any time during the tax year where the total cost of the property exceeded \$100,000 CAD? Complete T1135 checklist on our website.
(This includes foreign shares held in Canadian trading accounts)
2. Did you move 40km or more to be closer to your new work, business location or school during the tax year?
3. Did you sell your principal residence during the tax year?
4. Did you and/or your spouse (or partner) pay property taxes and/or rent?
5. Did you or your spouse (or partner) purchase a home during the tax year?
6. Did you work from home due to COVID at any point during 2022?
7. Are either you or your spouse eligible for the disability tax credit?
8. As a Canadian citizen, do you authorize CRA to provide your name, address date of birth and citizenship to Elections Canada?
9. Did you dispose of your principal residence in 2022?
10. Were you covered by a Private Medical Insurance Plan?

If you answered Yes to any of the above questions above, we will be following up with additional questions.

TAX SLIP CHECKLIST – CHECK ALL THAT APPLY

Personal Income

T4, T4A – Salaries, Employment, Pension

T4E – Employment Insurance Benefits

T4A(P) – CPP Benefits

T4(OAS) – Old Age Security

T4RIF – RRIF Income

T5007 – Social Services Benefits

T4A(P), T4A – Disability Benefits

Covid Related Benefits

Canada Recovery Sickness Benefit (CRSB)

Canada Recovery Caregiving Benefit (CRCB)

Investment Income

T3, T5, and T4PS – Interest and Dividends

T3 - Income from Mutual Funds

T5008 – Statement of Security Transactions

Interest on Tax Refund

T6000 – Canada Savings Bonds

Rental Income

Capital Gains/Losses (eg. disposal shares, bonds, real estate, cryptocurrency, etc)

Deductions

T2200 – Declaration of Condition of Employment

T2200S - Declaration of Condition of Employment
for Working at Home Due to COVID-19

Other Income

Exercise of stock options

Business or Professional Income

Partnership Income (Loss)

Scholarship/Bursaries

Alimony Received

Non-Refundable Credits

Charitable Donations, Political Contributions

Digital Subscriptions for Canadian News

First time Home Buyers Credit

Interest Paid on Student Loans

Adoption Expenses

Medical Expenses

T2202 – Tuition fees for yourself, your partner
and/or your dependant(s)

Family Caregiver–supported dependant with
physical/mental impairment

Solidarity Tax Credit

To be eligible for the Solidarity Tax Credit

you must be registered for direct deposit. If you have not registered and wish to do so, please
provide blank cheque marked “VOID”

Deductions

RRSP Contributions

Professional (or Union) Dues Childcare

Expenses (daycare, camp, babysitting)

Alimony Paid

Moving Expenses*

Investment Carrying Charges

Investment Counsel/Accounting Fees

EI repaid

Deductible Legal Fees

TL2 – Claim for Board and Lodging Expenses

Disability Deductions

Attendant Care Expenses

Capital or Non-Capital Losses Carryforward

Other

Home-Buyers' Plan

Lifelong Learners' Plan

Instalment payments made

***This is a guide to assist you in preparing for income tax filing. It does not necessarily include everything that may be applicable in your specific situation.**

Should you have any questions please contact us anytime via e-mail: info@TandemTax.ca