



## CLIENT INFORMATION FORM

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

First Name	Last Name	
Mailing Address		
Canadian citizen?	Did you arrive in the past year?	
Arrival Date (DD/MM/YYYY)	Date of Birth (DD/MM/YYYY)	
Email Address	Phone	
Social Insurance No.		
Marital Status	Date of change, if applicable:	
Copy of photo ID (new clients)	Male	Female

### 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 23600		
First Name	Quebec line 275		
Last Name			
Male	Female	SIN	Date of Birth (DD/MM/YYYY)
Phone	Email Address		
Canadian citizen?	Did spouse arrive in the past year?		
Arrival Date (DD/MM/YYYY)			

### Dependant(s) Information (if applicable)

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

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

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

Receipts for Québec tax credit for children's activities

## 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 or school during the tax year?
3. Did you sell your principal residence during the tax year?
4. Did you and/or your spouse pay property taxes and/or rent?
5. Did you or your spouse purchase a home during the tax year?
6. Are either you or your spouse eligible for the disability tax credit?
7. As a Canadian citizen, do you authorize CRA to provide your name, address, date of birth and citizenship to Elections Canada?
8. Have you made repayments in connection with COVID19 benefits?
9. Were you covered by a Private Medical Insurance Plan for the full tax year?

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## TAX SLIP CHECKLIST – CHECK ALL THAT APPLY

### Personal Income

T4, T4A – Salaries, Employment, Pension

T4E – Employment Insurance Benefits T4

T4A(P) – QPP Benefits

T4(OAS) – Old Age Security

T4RIF – RRIF Income

T4RSP – RRSP Income

RC62 - UCCB statement

T5007 – Social Services Benefits Plan

T10 - Pension adjustment reversal

Other (please specify)

### Investment Income

T5, and T4PS – Interest and Dividends

T3 - Income from Mutual Funds

T5008 – Capital Gains/Losses (eg. disposal shares, bonds, real estate, cryptocurrency, etc)

Interest on Tax Refund

Rental Income (T776)

T5013 - Partnership income

### Other Income

Exercise of stock options

Business or Professional Income (T2125)

Partnership Income (Loss)

Scholarship/Bursaries

Alimony Received

### Non-Refundable Tax Credits

Charitable Donations, Political Contributions  
Digital Subscriptions for Canadian News  
First time Home Buyers Credit  
Interest Paid on Student Loans  
Medical Expenses  
T2202 – Tuition fees for yourself, your partner and/or your dependant(s)  
Family Caregiver-supported dependant with physical/mental impairment  
Disability Tax Credit (T2201 on file with CRA)

### Refundable Tax Credits

Tax Credit for Home-Support Services for Seniors (RL-19, receipt from residence, snow removal, grass cutting, window washing, meal services, etc)  
Adoption Expenses  
Independent Living Tax Credit for Seniors  
Tax Credit for Children's Activities (Quebec)

### Other

Home-Buyers' Plan  
Lifelong Learners' Plan  
RL-31 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  
RL24 - Childcare Expenses (daycare, camp)  
Alimony Paid  
Moving Expenses  
Investment Carrying Charges  
Investment Counsel/Accounting Fees  
EI repaid  
Deductible Legal Fees

TL2 – Claim for Board and Lodging Expenses  
Attendant Care Expenses Capital or Non-Capital Losses Carryforward  
T2200 – Declaration of Condition of Employment  
First Home Savings Plan (FHSP)

2025 Instalment payments  
Federal      \$ \_\_\_\_\_  
Quebec      \$ \_\_\_\_\_

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**\*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 - [info@TandemTax.ca](mailto:info@TandemTax.ca)