

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. _____ Male _____ Female _____
 Marital Status _____ Date of change, if applicable: _____

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: _____
 First Name _____ Federal line 23600 _____
 Last Name _____ Quebec line 275 _____
 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 of 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?

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 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)

2024 Instalment payments

Federal \$ _____

Quebec \$ _____

***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