



Count myAccount

Interview Form Individual Tax Return

Tax Year: 20_____

Situations: Student Newcomer Investor Non-resident Self-Employed Small Business

Client Information:

First Name: _____ Last Name: _____ Initial: _____

SIN Number: _____ Date of Birth: _____

Address: _____ City: _____ Province: _____ Postal Code: _____

Email: _____ Mobile: _____ Time to Call: _____

Tax Information:

Marital Status (December 31): Single Married Common-law Widowed Separated Divorced

Change of Marital Status in Tax Year: NO Yes – Date of Change: _____

If Married or Common-law, spousal information is required even if not filing a tax return:

(More information is required; if your spouse or common-law partner wants to file a tax return, please fill out a separate form)

Spouse name: _____ SIN: _____ DOB: _____

Net Income: \$ _____.

If Separated or Divorced for the entire year:

Receiving or Paying Support? NO Yes – Child support: \$ _____ Spousal support: \$ _____

Spouse name: _____ SIN: _____ DOB: _____

Dependents (if applicable) Children, Parents, Grandparents, etc. (living at the same address):

Last Name	First Name	DOB	Relationship	Net Income	Disabled	SIN

Income report: T4 T4A T4RSP T3 T5 T5007 T5008 Rental Income Foreign Income

- Are you a U.S. citizen or a Green Card holder? NO Yes
- Did your marital status change in tax year? Change Date: _____ NO Yes
- Do you have any family Medical Expenses within the tax year? NO Yes
- Do you have any unclaimed Moving Expenses in the tax year? NO Yes
- Did you file any Disability with CRA? Type: _____ NO Yes
- Do you want to claim any Employment Expenses (T2200 or TL2)? NO Yes
- Are you holding foreign property in the tax year over CAD 100,000? NO Yes

Your Signature: _____ Date: _____