Count myAccount

Interview Form
Individual Tax Return

Tax Year: 20_____

Situations: ☐Employment ☐Student ☐Newcomer ☐Self-Employed ☐Investor ☐Non-resident

Client Information:

First Name: _____ Last Name: _____ Initial: _____

SIN Number: _____ Date of Birth: _____

Address: _____ Apt# ____ 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:

Spouse name: _____ SIN: _____ DOB: _____ Net Income: $ _____

If Separated or Divorced for the entire year:

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

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

1. Are you a Canadian Citizen? ☐NO ☐Yes
2. Did you become Canadian resident in the tax year? Date of entry: _____ ☐NO ☐Yes
3. Are you a U.S. citizen or a Green Card holder? ☐NO ☐Yes
4. Did your marital status change in tax year? Change Date: _____ ☐NO ☐Yes
5. Do you have any family Medical Expenses within the tax year? ☐NO ☐Yes
6. Do you have any unclaimed Moving Expenses in the tax year? ☐NO ☐Yes
7. Did you file any Disability with CRA? Type: _____ ☐NO ☐Yes
8. Do you want to claim any Employment Expenses (T2200 or TL2)? ☐NO ☐Yes
9. Are you holding foreign property in the tax year over CAD 100,000? ☐NO ☐Yes
10. Did you open a First Home Savings Account (FHSA) in tax year? ☐NO ☐Yes
11. Did you dispose of a housing unit (including a rental property)? ☐NO ☐Yes
12. Did taxpayer own an interest in a foreign affiliate at any time in tax year? ☐NO ☐Yes
13. Pay rent in tax year? #Monthes: ____ Total rent: _____ Landlord: _____ ☐NO ☐Yes
14. How would you like to receive your Notice of Assessment? (Email or Post): _____

Your Signature: _____ **Date:** _____