



# CLIENT INFORMATION FORM

Welcome to Tax Pro Niagara, please fill out this form and send in or drop off with your tax documents. This form is for all clients (new and returning) and is a required form. Let us know if you have any issues.

### CLIENT INFORMATION:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Insurance Number(SIN): \_\_\_\_\_ Date of Birth (dd/mm/yy): \_\_\_\_\_

Current Address: \_\_\_\_\_ City: \_\_\_\_\_

Email Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Is this a cell phone? \_\_\_\_\_

Marital Status on Dec 31 of last year? (married, single, separated, common-law, divorced, widowed) \_\_\_\_\_

Did your marital Status Change from last Year? (y/n) \_\_\_\_\_ Candian Citizenship? (yes/no/PR) \_\_\_\_\_

Do you claim the Disability Tax Credit? (yes/no) \_\_\_\_\_

### Spouse/Common-Law Partner Information:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Insurance Number(SIN): \_\_\_\_\_ Date of Birth (dd/mm/yy): \_\_\_\_\_

Address only if Different: \_\_\_\_\_ Email Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Is this a cell phone? \_\_\_\_\_

Does your spouse claim the Disability Tax Credit? \_\_\_\_\_ Candian Citizenship? (yes/no/PR) \_\_\_\_\_

Are we filing your Spouse's/Common Law Partner's taxes? \_\_\_\_\_ If NO, please indicate their Net Income: \_\_\_\_\_

### Dependants Information:

First Name:	Last Name:	Date Of Birth: (dd/mm/yy)	Relationship (son/daughter etc..):	Were they employed:	College/ University Student?	Do they Claim Disability Tax Credit?	Did they have daycare/daycamp expenses? If so receipt must be provided.

**Please check any that apply - in the notes please indicate if it is for yourself, or for your partner or both:**

	Check for Yes:	Note:
1) I have Small Business/Subcontracting/Freelance Income - please email to request the form to fill out for that income		
2) I moved over 40km for a new job or business and have moving expenses to claim		
3) I am currently in Bankruptcy Status. Has it been discharged? Please indicate status.		
4) I have Rental Income - please email to request the form to fill out for that income		

5) I have Foreign Income, or Foreign Pension Income - (we will need documentation)		
6) I am a First Time Home Buyer		
7) I sold a property during the year, please indicate if personal use property or rental property		
8) I am claiming Employment Expenses - please email for form to fill out, we will require a signed T2200 from your employer		
9) I am new to Canada. If so we will need date of arrival and income from previous home converted to CDN \$		
10) I have changed provinces. If so we will need to know date of move and previous province name.		
11) I have medical expenses to claim. I will fill out the medical expense form supplied to me.		
12) I have charitable or political donations to claim. I will fill out the donation form supplied to me.		
13) I was in school (college/university). Please provide T2202 and any relevant T4A slips. This is all that can be claimed for tuition, NO supplies or Parking.		
14) I paid professional association fees/dues. I have union dues claimed on a separate form (any dues on T4 don't require extra documentation) - please provide receipts (ie/nursing, OCT)		
15) I took a course towards my career that was not on a T2200. I took professional exams/upgrading - we will require receipts.		
16) I paid interest on my student loans and I will provide the documentation to Tax Pro Niagara.		
17) I paid rent last year - please indicate total amount paid		
18) I paid property tax last year - please indicate total amount paid		
19) I contributed to RRSP's in 2023 - will need an RRSP contribution slip for March-Dec 2023 (see question 17 below). Please note this will require a slip from fro financial instituion, not your yearly statement		
20) I contributed to RRSP's in Jan/Feb of 2024 - will need a SECOND RRSP contribution slip for Jan/Feb 2024		
21) I opened and contributed to an FHSA in 2023 (First Home Savings Account) - we will need a T4FHSA slip for Dec-Jan 2023		
22) I withdrew funds from my RRSP's in 2023 - will need a T4RSP slip		