

# INTAKE FORM

\*Send in with, or drop off with your paperwork\*

Welcome to Tax Pro Niagara, please fill out this form to the best of your ability!

## CLIENT INFORMATION:

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

Social Insurance Number(SIN): \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Email Address: \_\_\_\_\_

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

What was your Marital Status on Dec 31 of last year? \_\_\_\_\_ (Married, Common-law, Separated, Divorced, Single, Widowed)

Did your Marital Status change from previous year? \_\_\_\_\_

Do you claim the Disability Tax Credit? \_\_\_\_\_

## Spouse/Common-Law Partner Information:

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

Social Insurance Number(SIN): \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Email Address: \_\_\_\_\_

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

Does your spouse claim the Disability Tax Credit? \_\_\_\_\_

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

## Dependants Information:

Last Name:	First Name:	Date Of Birth:	Net Income:	Daycare Expenses:	Relationship:	College/ University Student?	Disabled?

- 1) Do you have Business Income? \*(Please email taxproniagara@outlook.com to discuss requirements)
- 2) Did you move over 40km for a new job, school, or business? (Please email taxproniagara@outlook.com to discuss requirements)
- 3) Are you currently in Bankruptcy Status? Has it been discharged? (please indicate status)
- 4) Do you have Rental Income? \*(Please email taxproniagara@outlook.com to discuss requirements)
- 5) Do you have Foreign Income, or Foreign Pension Income? (We will require documentation)
- 6) Did you BUY or SELL and properties in the year? (Please indicate Buy or Sell)
- 7) Are you claiming Employment Expenses or did you work from home? (Please see section below.)
- 8) Are you a Tradesperson or Apprentice and you temporarily Relocated for work? (see Forms section of www.taxproniagara.com)
- 9) Are you claiming the Staycation Tax Credit (see Forms section of www.taxproniagara.com)
- 10) Did you move to Canada last year? (We will need date of entry and any income earned outside of Canada converted to Canadian \$ for the year)
- 11) Did you change provinces last year? (We will need date of move)

<b>NEW CLIENTS</b>	<p style="text-align:center;"><b>**NEW CLIENTS ONLY</b> - A Picture of your Government Photo Identification is required to be submitted**</p> <p>PHOTO ID TYPE: _____ (Driver's License, Passport, Health Card, etc)</p>	
<b>MEDICAL and CHARITABLE</b>	<p>MEDICAL EXPENSES TOTAL: \$ _____ CHARITABLE DONATIONS TOTAL: \$ _____</p> <p style="text-align:center;">DO NOT submit the receipts, only FILL IN the TOTAL AMOUNT please. Please see the Forms section of the website for Donation and Medical Forms if required</p>	
	<p><b>PROPERTY TAX TOTAL: \$ _____</b> <span style="float:right;"><b>** Only include 1 rent receipt per address.</b></span></p>	
<b>RENT or PROPERTY TAX</b>	<p><b>Rent Totals:</b></p> <p># of Months: _____ Total Paid:\$ _____ # of Months: _____ Total Paid:\$ _____</p> <p>LANDLORD NAME: _____ LANDLORD NAME: _____</p> <p>ADDRESS: _____ ADDRESS: _____</p>	
<b>SCHOOL or COURSES</b>	<p>Did you pay interest on STUDENT LOANS? (Y/N): _____ <span style="float:right;">**Can only claim this if you included the form from the National Student Loan Center Website</span></p> <p>Were you in school or take any courses (Y/N): _____ <span style="float:right;">**Can only claim this if you include a copy of your T2202</span></p>	
<b>RENTAL, DRIVING, SMALL BUSINESS</b>	<p>RENTAL INCOME (Y/N) _____ DRIVING INCOME (Y/N) _____ SMALL BUSINESS INCOME(Y/N) _____</p> <p style="text-align:center;">**FOR THE ABOVE (rental, driving or small business income), you <b>MUST</b> include the spreadsheet(s) that pertains to your income with your breakdown of Income/Expenses - (Rental Income, Driving Income, Business Schedule).</p> <p style="text-align:center;">**If you don't have a spreadsheet or bookkeeping system, please email taxproniagara@outlook.com and request one. <b>This is a REQUIREMENT unless other arrangements have been made.</b></p>	
<b>WORK FROM HOME</b>	<p>Are you claiming WORK FROM HOME expenses (Y/N)?</p> <p>BASIC - How many days worked from home in the year? This basic claim can be made is your worked from home due to COVID and you are not claiming detailed expenses using a T2200 Form</p> <p>DETAILED - (Form T2200 Detailed Required) please email taxproniagara@outlook.com to request a spreadsheet to fill in. This is for employees who work from home <u>not</u> due to COVID, or those who work from home due to COVID but want to claim detailed not basic</p>	

**DO NOT INCLUDE THE FOLLOWING IN YOUR DOCUMENT UPLOAD:**  
**Paystubs, ROES, Last year's taxes or Notice of Assessments, Letters about GST/Trillium, or any Receipts unless requested by Tax Pro Niagara**

NOTES: \_\_\_\_\_  
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