

## YEARLY UPDATE FORM FOR ALL CLIENTS

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:	<input style="width: 95%;" type="text"/>	Last Name:	<input style="width: 95%;" type="text"/>	
Social Insurance Number (SIN):	<input style="width: 95%;" type="text"/>	Date of Birth: <small>(Type out date i.e./ Oct 15, 1987)</small>	<input style="width: 95%;" type="text"/>	
Current Address:	<input style="width: 95%;" type="text"/>		City:	<input style="width: 95%;" type="text"/>
Email Address:	<input style="width: 95%;" type="text"/>		Postal Code:	<input style="width: 95%;" type="text"/>
Phone Number:	<input style="width: 95%;" type="text"/>		Is this a cell phone? <small>(yes or no)</small>	<input style="width: 95%;" type="text"/>
Marital Status on Dec 31 of last year? (married, single, separated, common-law, divorced, widowed)				<input style="width: 95%;" type="text"/>
Did your marital Status Change from last Year? (yes or no)	<input style="width: 95%;" type="text"/>	If your status changed, indicate the exact date (i.e./ date of separation/marriage/divorce) <small>(Type out date i.e./ Oct 15, 1987)</small>	<input style="width: 95%;" type="text"/>	
Do you claim the Disability Tax Credit? <small>(yes/no)</small>	<input style="width: 95%;" type="text"/>	Canadian Citizenship? <small>(yes/no/PR/student/work permit)</small>	<input style="width: 95%;" type="text"/>	

### Spouse/Common-Law Partner Information:

First Name:	<input style="width: 95%;" type="text"/>	Last Name:	<input style="width: 95%;" type="text"/>	
Social Insurance Number (SIN):	<input style="width: 95%;" type="text"/>	Date of Birth: <small>(Type out date i.e./ Oct 15, 1987)</small>	<input style="width: 95%;" type="text"/>	
Address only if Different from above:	<input style="width: 95%;" type="text"/>		Email Address:	<input style="width: 95%;" type="text"/>
Phone Number:	<input style="width: 95%;" type="text"/>		Is this a cell phone? <small>(yes or no)</small>	<input style="width: 95%;" type="text"/>
Claim the Disability Tax Credit?	<input style="width: 95%;" type="text"/>	Canadian Citizenship? <small>(yes/no/PR/student/work permit)</small>	<input style="width: 95%;" type="text"/>	
Are we filing your Spouse's/Common Law Partner's taxes? (YES OR NO)	<input style="width: 95%;" type="text"/>	If NO, please indicate their Net Income:	<input style="width: 95%;" type="text"/>	

### Dependants Information:

First Name:	Last Name:	Date Of Birth: <small>(Type out date i.e./ Oct 15, 1987)</small>	Relationship <small>(son/daughter etc..):</small>	Were they employed: <small>(yes or no)</small>	College/ University Student? <small>(yes or no)</small>	Do they Claim Disability Tax Credit? <small>(yes or no)</small>	Did they have daycare/day camp expenses? <b>If so receipt must be provided.</b>

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

	Yes or No	Notes or Added Info:
I have Foreign Assets with a value over \$100,000 CDN (this can be foreign real estate, rental property, home or investments)	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
I have Small Business/Subcontracting/Side Gig/Driving (uber, door dash)/Freelance Income If yes, please email to request the form to fill out for that income (taxproniagara@outlook.com)	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

I have Rental Income (I rent out part of my own home, a separate home or Airbnb) If yes, please email to request the form to fill out for that income (taxproniagara@outlook.com)		
I pay or receive support (child support or spousal support). Please indicate details in the notes		
I am currently in Bankruptcy Status. Has it been discharged? Please indicate status in notes		
I have Foreign Income (income earned outside of Canada), or Foreign Pension Income (we will need documentation of that income)		
I moved over 40km for a <u>new job or business</u> and have moving expenses to claim. If yes, please email to request the form to fill out for that income (taxproniagara@outlook.com)		
I am a First Time Home Buyer (yes or no)		
I sold a property during the year, please indicate if personal use property (the home I live in) or rental property (an income producing property I don't live in) or mixed (an income producing property I DO live in)		
I am claiming Employment Expenses (working from home, driving for work, truck driver, commissioned employee) <b>NOTE: we will require a signed T2200 from your employer</b> If yes, please email to request the form to fill out (taxproniagara@outlook.com)		
I am a newcomer to Canada. Is yes, please indicate date of arrival in notes.		
I changed provinces last year. If so we will need to know date of move and previous province name in the notes.		
I have medical expenses to claim. I will fill out the medical expense form supplied to me. (We do not require tax receipts from you, but be aware that the CRA may request them at any time, so please make sure you save your copies to provide to the CRA if asked)		
I have charitable or political donations to claim. I will fill out the donation form supplied to me. (We do not tax receipts from you, but be aware that the CRA may request them at any time, so please make sure you save your copies to provide to the CRA if asked)		
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. (Tax Receipts can be found on your student blackboard account)		
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 (i.e./nursing, OCT)		
I took a course towards my career that was not on a T2200. I took professional exams/upgrading - please provide receipts.		
I paid interest on my student loans and I will provide the documentation to Tax Pro Niagara. (tax receipts can be found on the Canada Student Loans website)		
I paid rent last year - please indicate total amount paid in notes  (We do not require rent receipts from you, but be aware that the CRA may request them at any time, so please make sure you save your copies to provide to the CRA if asked)		
I paid property tax last year - please indicate total amount paid  (We do not tax receipts from you, but be aware that the CRA may request them at any time, so please make sure you save your copies to provide to the CRA if asked)		
I contributed to RRSP's in the previous calendar year - will need an RRSP contribution slip for March-December of the previous calendar year. Please note this will require a slip from financial institution, not your yearly statement		

I contributed to RRSP's in Jan/Feb of the current calendar year - will need a SECOND RRSP contribution slip for Jan/Feb of current year		
I contributed to an FHSA in the past calendar year (First Home Savings Account) We will need a <u>T4FHSA slip</u> .		
I withdrew funds from my RRSP's in the previous calendar year We will need a T4RSP slip		