

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? _____

Marital Status on Dec 31 of last year? _____ 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 or Daycamp Expenses:	Relationship:	College/ University Student?	Disabled?

- 1) Do you have Business Income? *(Please email taxproniagara@outlook.com to request spreadsheet)
- 2) Did you move over 40km for a new job or business? (Please email 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 request spreadsheet)
- 5) Do you have Foreign Income, or Foreign Pension Income? (will need documentation)
- 6) Did you BUY or SELL and properties in the year? Please indicate buy/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 website)
- 9) Did you move to Canada last year? Need date of arrival and income earned before move converted to CDN \$
- 10) Did you change provinces last year? We will need which province you moved from and date of move.
- 11) Are you claiming the staycation Tax Credit? (paid for accomodations within Ontario in 2022) Please fill out the Form in the Forms section of the website at www.taxproniagara.com/forms

NEW CLIENTS	**NEW CLIENTS ONLY - A Picture of your Government Photo Identification is required to be submitted**		
	PHOTO ID TYPE: _____ (Driver's License, Passport, Health Card, etc)		
MEDICAL and CHARITABLE	MEDICAL EXPENSES TOTAL: \$ _____	CHARITABLE DONATIONS TOTAL: \$ _____	
<p>Please see the Forms Tab on the website if you'd like to provide Detailed information. DO NOT submit the receipts, only FILL IN the TOTAL AMOUNT please.</p>			
RENT or PROPERTY TAX	PROPERTY TAX TOTAL: \$ _____ ** Only include 1 rent receipt per address.		
	<u>Rent Paid At Property # 1</u>	<u>Rent Paid At Property # 2</u>	
	# of Months: _____ Total Paid: _____	# of Months: _____ Total Paid: _____	
	LANDLORD NAME: _____	LANDLORD NAME: _____	
	ADDRESS: _____	ADDRESS: _____	
SCHOOL or COURSES	Did you pay interest on STUDENT LOANS? (Y/N): _____ **Can only claim this if you included the form from the National Student Loan Center Website Were you in school or take any courses (Y/N): _____ **Can only claim this if you include a copy of your T2202		
RENTAL, DRIVING, SMALL BUSINESS	RENTAL INCOME (Y/N) _____	DRIVING INCOME (Y/N) _____	SMALL BUSINESS INCOME(Y/N) _____
<p>**FOR THE ABOVE (rental, driving or small business income), you <u>MUST</u> include the spreadsheet(s) that pertain to your income with your breakdown of Income/Expenses - (Rental Income, Driving Income, Business Schedule). **If you don't have a spreadsheet, please email taxproniagara@outlook.com and request one. This is a REQUIREMENT unless other arrangements have been made.</p>			
WORK FROM HOME	Are you claiming WORK FROM HOME expenses (Y/N)? _____ <u>BASIC</u> - How many days worked from home in the year? _____ <u>DETAILED</u> - Form T2200 Detailed Required) please email taxproniagara@outlook.com to request a spreadsheet to fill in. This is for employees who work from home not due to COVID, or those who work from home due to COVID but want to claim detailed not basic. There is more information about working from home here: www.taxproniagara.com/links		

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

Leave us a Note!	
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WWW.TAXPRONIAGARA.COM