

New Client Personal Tax Intake Form – Taxation Year _____ (One form per couple)

Name: _____ SIN: _____ Birth Date: _____
First Last yyyy-dd-mm

Spouse: _____ SIN: _____ Birth Date: _____
First Last yyyy/dd/mm

Address: _____

Email(s): _____

Phone Number(s): _____

Spouse or Common-Law Partner net income if tax return is not prepared by LW Accounting: _____

MARITAL STATUS Married Single Common-Law Separated Divorced Widowed If changed in the year, please provide date): _____
yyyy/mm/dd

DEPENDENT INFORMATION

Name/Relationship	Date of Birth <small>year/mm/dd</small>	SIN	T4/T4A	Disability Tax Credit <small>(approved by CRA)</small>	Tuition	Daycare <small>(inc. preschool)</small>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DID YOU DISPOSE OF PROPERTY IN THE YEAR? Yes No

IF YES, WAS IT YOUR PRINCIPAL RESIDENCE? Yes No If Yes, see Note 1

DO YOU OWN FOREIGN PROPERTY/INVESTMENTS/STOCKS? (INCLUDES US) Yes No

Own/hold any foreign property costing more than \$100,000? Yes No
(including US stocks invested through Canadian brokers)

DID YOU OPEN A FIRST HOME SAVINGS ACCOUNT IN 2024? Yes No

DID YOU MAKE A CONTRIBUTION IN 2024? Yes No

ARE YOU A CANADIAN CITIZEN? Yes No

DID YOU IMMIGRATE TO OR EMIGRATE FROM CANADA IN 2024? Not applicable

If you moved to Canada in 2024, what was your date of entry? _____
yyyy/mm/dd

If you moved out of Canada in 2024, what was your date of departure? _____
yyyy/mm/dd

DO YOU HAVE US CITIZENSHIP, A GREEN CARD, OR DID YOU SPEND MORE THAN 121 DAYS IN THE UNITED STATES? Yes No

DO YOU WANT TO PROVIDE NAME, ADDRESS, DOB AND CITIZENSHIP INFORMATION TO ELECTIONS CANADA? Yes No

Prior Year Tax Information (Please Provide)

Last year's Notice of Assessment

Income

- T4 slips
- T4A (pension/self-employment/commissions)
- T4E (employment insurance)
- T5007 (social assistance)
- T4AP (Canada pension plan benefits)
- T4A (OAS) old age security
- T4A(RCA) retirement compensation arrangement
- T4PS (statement of employee profit-sharing plan)
- T4RSP (registered retirement savings plan)
- T4 RIF (registered retirement income fund)
- T3 (income from trust allocations)
- T5 (investment income)
- T5013(A) (partnership income)
- T5008 (income from security transactions)
- Sale of stocks/bonds (attach gains/loss statement)
- Support payments received (attach support agreement)
- Foreign pension
- Self-employment (Statement of Business Activities)
- Rental income (Statement of Real Estate Rentals)

Deductions/Credits (attach receipts)

- RRSP contributions (include first 60 days of current year receipts)
- First Home Savings Account contributions
- Childcare expenses for each child
- Child fitness and arts receipts
- Medical expenses
- Charitable donations and political contributions
- Union and professional dues
- Support payments made—attach support agreement
- Disability tax credit approved by CRA (form T2201)
- Multigenerational Home Renovation
- T2202 (Tuition/education amounts) - signed by student
- Student loan interest statement
- Employment expenses – signed T2200 form (provided by employer)
- Interest paid to earn business or investment income
- Teacher's school supplies receipts
- New home buyers' amount – attach purchase agreement
- Volunteer firefighter/search & rescue - attach statement
- Tax instalments (slips or details)
- Adoption expenses
- Online news subscriptions
- Moving expenses
- Northern Resident Deduction

Note 1: Disposition of principal residence

If you sold your principal residence in the tax year, please complete the following:

Address of the property: _____

Year of acquisition: _____ Sale Price: _____

Was it your principal residence the entire time? (e.g. used as rental): _____

Is the property jointly owned with a spouse/other? No Yes - If yes, split %: _____

Additional Information

2025 FEES (\$)

Basic Charge	\$140
T3 (per slip)	\$10
T4 (per slip)	\$10
T5 (per slip)	\$10
T4A (P) / T4A (OAS) & most other T-slips (per slip)	\$10
Capital Stock Transaction (per summary)	\$10
Child Care Expense Schedule	\$15
Donations (per receipt)	\$2
Medical Expense Schedule	starting at \$20
Moving Expense Schedule	starting at \$50
RRSPs (per slip)	\$10
Tuition Fee Schedule (T2202)	\$10
Transfer of Tuition Fee from a Student	starting at \$15
Children's Sports and Arts Amount	\$20
T1 Adjustments Starting at	starting at \$75
Pension Income Splitting (per person)	\$15
T776 Rental Activities	As quoted
T2125 Business Activities	As quoted
Other Credits	As applicable
Employment Expenses	As quoted