Mirza Professional Corporation

Chartered Professional Accountant

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Personal Taxes - Client Intake Form

1. Personal Information

	Full Name	SIN	Date of Birth (DD/MM/YYYY)	M/F
Client				
Spouse				
Dependent 1				
Dependent 2				

Marital Status: ☐ Single ☐ Married ☐ Common Law ☐ Separated ☐ Divorced ☐ Widowed

If marital status has changed, date of change: ______________________

Address (including city, province, postal code)

Phone (cell, home, work)

Emails

2. Real Estate Property

			Info Required
Did you purchase or sell your principal residence?	☐ Yes	☐ No	purchase price, purchase date
Are you a first time home buyer?	☐ Yes	☐ No	sale price, date of sale
Own an investment property? Domestic or foreign?	☐ Yes	☐ No	rental income statement WS

3. Special Situations

Do you own any investments / property outside Canada? ☐ Yes ☐ No Form T1135, details required

Are you supporting anyone over 65 years of age (parents, grandparents, uncles, aunts, etc.)?

Relationship	Full Name	SIN	Date of Birth	Income

Do you have a disability? Pay for disability supports?	☐ Yes	☐ No	Complete Form T2201
Do you support someone who has a disability?	☐ Yes	☐ No	Provide receipts
Do you pay for certain employment expenses?	☐ Yes	☐ No	T2200 - signed by employer
Did you move due to work or school?	☐ Yes	☐ No	Prev address, travel exp, meals,
Distance between your old home and work/school?	______________		accommodation, costs of selling
Distance between your new home and work/school?	______________		old res, purchasing new res

Did you adopt a child? □ Yes □ No full name, SIN, date of birth

adoption agency fees, court costs, legal fees, document translation fees, travel, immigration fees, government fees

Do you live in a prescribed northern zone? □ Yes □ No

Did you immigrate to Canada during last year? □ Yes □ No date of entry: ____________

Do you have income from the US? □ Yes □ No employment? investment?

Details of US income/expenses, copy of most recent US1040 business? rental?

4. Income Sources

Are you self-employed? □ Yes □ No (income statement WS)

Income Sources

- ☐ T4 - Employment
- ☐ T4A - Commission, Self employed
- ☐ T5 - Investment Income
- ☐ T3 - Investment Income
- ☐ T4PS - Investment Income
- ☐ T5008 - Securities Transactions
- ☐ RC62 - Universal Child Care Benefit
- ☐ T4E - Employment Insurance
- ☐ T5013 - Partnership Income
- ☐ T4RSP - Income from RSP
- ☐ T5007 - Workers Compensation
- ☐ T5007 - Social Assistance
- ☐ T5018 - Contractors Income
- ☐ T4A(OAS)
- ☐ T4A(P) - CPP
- ☐ T4A(P) - Disability
- ☐ T4A(RCA)
- ☐ T4RIF - Registered Retirement Income Funds
- ☐ Research grants
- ☐ Support payments received
- ☐ Commissions
- ☐ Royalties
- ☐ Foreign pensions
- ☐ Any other income

Deductions

- ☐ RRSP contributions
- ☐ Company pension RPP
- ☐ Union dues
- ☐ Professional association fees
- ☐ Child care expenses
- ☐ Moving expenses
- ☐ Support payments paid
- ☐ Carrying charges for investments
- ☐ Employment expenses - T2200
- ☐ Installment taxes

Credits

- ☐ Property taxes (condo/home)
- ☐ Rent (home/apt/condo)
- ☐ Medical expenses
- ☐ Charitable donations
- ☐ Public transit payments
- ☐ Amount spent on children's fitness
- ☐ Amount spent on children's arts
- ☐ Interest paid on student loans
- ☐ Tuition amounts - T2202A
- ☐ Disability certificate - T2201

- ☐ Previous year NOA / tax return (if available)

5. New Client Acceptance Checklist

Has client integrity been considered?	□ Yes	□ No	□ N/A
Has the client's reputation/image been considered?	□ Yes	□ No	□ N/A
Has the client's business acumen been considered?	□ Yes	□ No	□ N/A
Do we have internal competence to perform engagement?	□ Yes	□ No	□ N/A
Do we have internal resources to complete and deliver work on time?	□ Yes	□ No	□ N/A
Independence - Non-assurance: no significant threats to independence?	□ Yes	□ No	□ N/A
Is our firm free of any conflicts of interest with the client?	□ Yes	□ No	□ N/A
Are there any issues to the collection of professional fees?	□ Yes	□ No	□ N/A
Have we screened the client? Initial assessment to move forward?	□ Yes	□ No	□ N/A
Decision made to accept client	☐ Accept	☐ Decline	