

**PERSONAL INFORMATION SHEET**

Please complete the following sections to assist us with preparing your tax return.

**CONTACT INFORMATION**

**Your Name:** \_\_\_\_\_ **SIN:** \_\_\_\_\_ **Birthdate:** \_\_\_\_\_  
 (MM/DD/YYYY)

**Your Spouse's/  
 Partner's Name:** \_\_\_\_\_ **SIN:** \_\_\_\_\_ **Birthdate:** \_\_\_\_\_  
 (MM/DD/YYYY)

**Address:** \_\_\_\_\_ **Phone #:** \_\_\_\_\_

\_\_\_\_\_ **Email:** \_\_\_\_\_

**Preferred Methods of Communication?**

For questions regarding your tax return:  Phone  Email  
 For notification that your return is ready for pick-up:  Phone  Email

**MARITAL STATUS AND DEPENDANTS**

**Marital Status**      Single      Married      Separated      If marital status changed during  
 (circle one)      Divorced      Widowed      Common-law      year, give month/day of change: \_\_\_\_\_

If we do not prepare your spouse's tax return, please provide their net income for the year (Line 236 of their return)      \$ \_\_\_\_\_

**Dependants**

Please provide the following information for each dependant you financially supported during the year:

#	Dependant Name (First and Last)	SIN	Gender (M/F)	Date of Birth (MM/DD/YYYY)	Relationship to You	Live with You?	We prepare return?	Net Income (\$)
1								
2								
3								

**GENERAL INFORMATION**

**Please answer the following questions:**

	<u>Taxpayer</u>		<u>Spouse/Partner</u>		<u>Dependants</u>	
Would you like to receive this notification electronically next year?	Y	N	Y	N	Y	N
Did you sell your principal residence during the year?	Y	N	Y	N	Y	N
Are you a Canadian Citizen?	Y	N	Y	N	Y	N
Are you also a citizen of another country? If yes, what country?	Y	N	Y	N	Y	N
Did you own foreign property with a cost of over \$100,000 CDN at any time during the year?	Y	N	Y	N	Y	N
Do you authorize CRA to give your name and address to Elections Canada for the voters list?	Y	N	Y	N	Y	N