

**RETURNING CLIENT TAX FORM**

**\*REVIEW ENTIRE FORM\***

**TAX PAYER #1:** (Last) \_\_\_\_\_ (First) \_\_\_\_\_

**TAX PAYER #2:** (Last) \_\_\_\_\_ (First) \_\_\_\_\_

Preferred contact method:  Phone  Email  
(Please provide both) Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**MARITAL STATUS:** Did your marital status change during the tax year? No  Yes  : mm \_\_\_\_\_ dd \_\_\_\_\_

Current Status: Married  Separated  Common Law  Divorced  Widowed  Single

Spousal Support: No  Yes  : Paid: \_\_\_\_\_ Received: \_\_\_\_\_

**HOME ADDRESS:** Same as last year? Yes  No  : Fill in new home address below:

Apt # \_\_\_\_\_ Street: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Update Address with CRA? Yes:  No:

Rent  Own  Other  : \_\_\_\_\_

**SALE/PURCHASE OF HOME:**

Sold Principal Residence during tax year? No  Yes  :  
Year of Purchase: \_\_\_\_\_ Proceeds of Sale: \_\_\_\_\_

First time Home Buyer? No  Yes

**DEPENDANTS:** Same as last year? Yes  (skip section) No  (fill out below)

	DOB (yyyy,mm,dd)	SIN
Name: _____	_____	_____
Name: _____	_____	_____
Name: _____	_____	_____

**CUSTODY AGREEMENT:** Same as last year? Yes  (skip section) No  (fill out below)

	Child Support: Paid <input type="checkbox"/> Received <input type="checkbox"/>	% of custody:	Eligible Dependent?	(Climate Action Incentive) C.A.I?
Name: _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
Name: _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
Name: _____	_____	_____	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>

**OTHER INFORMATION:**

Any Family Members with a Disability? Y <input type="checkbox"/> N <input type="checkbox"/>	Do you require an HST return to be filed for self-employment or rental income? Y <input type="checkbox"/> N <input type="checkbox"/>
Do you have a child in Post-Secondary? Y <input type="checkbox"/> N <input type="checkbox"/>	Access Code for Netfile: _____
Transfer Tuition Credits to a parent? Y <input type="checkbox"/> N <input type="checkbox"/>	