

2019 Personal Income Tax

Date: _____

Name: _____

S.I.N #: _____

Date of Birth: _____

Did you sell your home in 2019? Yes No

Address: _____

If Yes, please provide date of purchase: _____

please provide proceeds on sale: _____

Did you own foreign property in 2019 over \$100,000? Yes No

Did you purchase your first home in 2019? Yes No

Phone Number: _____

If Yes, has your spouse claimed a first time home buyer's credit

Email Address: _____

in prior years? Yes No

NO CHANGE

NO CHANGE

Marital Status: Married Divorced Separated Single Common-law

Did this change in 2019? Yes No

If Yes, please provide date of change: _____

Spouse:

Name: _____ Date of Birth: _____ S.I.N #: _____

Are we doing their tax return as well? Yes No

If No, please provide their Net Income for 2019: _____

Dependents:

Child Name: _____ Date of Birth: _____ Male Or Female: _____

Child Name: _____ Date of Birth: _____ Male Or Female: _____

Child Name: _____ Date of Birth: _____ Male Or Female: _____

Child Name: _____ Date of Birth: _____ Male Or Female: _____

Do all Dependents above reside with you as of Dec 31, 2019? Yes No

NO CHANGE

FLIP OVER 

Are you aware of any missing tax slips? Yes No

If yes, please provide

Type of slip: _____ Received on: _____

Type of slip: _____ Received on: _____

Have you signed the T183 (Electronic Filing Form)? Yes No **(SIGN PART G)**

If we are doing a spouse, have they signed as well? Yes No **(SIGN PART G)**

****Important Change****

Capital Accounting is making the shift to use less paper; **we will be emailing you your tax return once it's finished** to the email provided above using your Social Insurance Number as the secure password. We will prepare your 2019 personal income tax return based on the information provided to us today. Processing times take up to 2 weeks. If we do not have all signed forms or documents needed and payment on account once finished we will not file to the Canada Revenue Agency and this could result in late filing penalties and/or interest. By signing I understand that a reprocessing fee of \$50 will be charged if any slips are handed in after Capital Accounting processes my paperwork.

Signature: _____