

## Personal Income Tax

(Only one form required per family)

Date: \_\_\_\_\_ Did you sell your home in year? Yes No  
Name: \_\_\_\_\_ If Yes, date of purchase of sold home: \_\_\_\_\_  
S.I.N #: \_\_\_\_\_ Proceeds on sale of sold home: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ Foreign property in year over \$100,000? Yes No  
Address: \_\_\_\_\_ Did you purchase your first home in year? Yes No  
\_\_\_\_\_ If Yes, has your spouse claimed a first time home  
\_\_\_\_\_ buyer's credit in prior years? Yes No  
\_\_\_\_\_  
Phone #: \_\_\_\_\_  
Email: \_\_\_\_\_

NO CHANGE

NO CHANGE

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

Did this change in this year? Yes No

If yes, please provide date of change: \_\_\_\_\_

**Spouse:**

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ S.I.N #: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

Are we doing their tax return as well? Yes No

If No, please provide their Net Income for this year: \_\_\_\_\_

**FLIP OVER**

**Dependants:**

**Child Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_ **M/F** \_\_\_\_\_

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**Child Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_ **M/F** \_\_\_\_\_

**Child Name:** \_\_\_\_\_ **Date of Birth:** \_\_\_\_\_ **M/F** \_\_\_\_\_

Do all Dependants above reside with you as of Dec 31 of this year? **Yes No**

**NO CHANGE**

**Are you aware of any missing tax slips? Yes No**

If Yes, please provide:

**Type of slip:** \_\_\_\_\_ **Received On:** \_\_\_\_\_

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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 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, or payment on account, we will not file your taxes with the Canada Revenue Agency. This could result in late filing penalties and/or interest. By signing I understand that a reprocessing fee of \$100 will be charged if any slips are handed in after Capital Accounting processes my paperwork.

**Signature:** \_\_\_\_\_