

**Tax Physicians Inc.**  
**Client intake questionnaire (one per family)**

**Client Name** \_\_\_\_\_

**Date** \_\_\_\_\_

**# of returns to be prepared:** \_\_\_\_\_

**Current email address:** \_\_\_\_\_

**How would you like us to contact you?**  
 (Please provide preferred contact)

<input type="checkbox"/>	Home phone	_____
<input type="checkbox"/>	Cell phone	_____
<input type="checkbox"/>	Work phone	_____
<input type="checkbox"/>	Email	_____

**What's new? (tick only those that apply)**

Change of address? *If yes, please request and complete our "Change of address form"*

Moving expense claim?

First-time homebuyer credit?

Child born in the year? Date: \_\_\_\_\_ Name: \_\_\_\_\_

Representative of deceased taxpayer? *(partner to meet with representative and prepare "Client intake questionnaire for deceased taxpayer")*

Change in marital status?

<input type="checkbox"/>	Single	<input type="checkbox"/>	Widowed
<input type="checkbox"/>	Married	<input type="checkbox"/>	Separated <i>(complete separate questionnaire)</i>
<input type="checkbox"/>	Common-law	<input type="checkbox"/>	Divorced <i>(complete separate questionnaire)</i>

Date of change: \_\_\_\_\_  
 Name change: \_\_\_\_\_

Preparing spouse/common-law partner return for first time? *(complete "New client" form for spouse)*

**General matters (tick only those that apply)**

Have you provided us with all of your RRSPP receipts including all contributions made January 1 to March 3, 2014?

Are you claiming the Ontario Healthy Home Renovation Tax Credit for Seniors?

Will someone other than the taxpayer sign the tax return? *(need copy of Power of Attorney)* (On file) (To come)

Is anyone a US Citizen or Green-Card holder?

US return required?  Quebec return required?

Have you provided us with your 2013 Ontario property taxes or rent paid? \$ \_\_\_\_\_ (Taxes) (Rent)

If we are not preparing spouse's return, we need spouse's net income \$ \_\_\_\_\_

Pension splitting election? *(if yes, we need to prepare both spouse's returns)*

Tuition & education credit transferred from child? *(if yes, we need tuition receipt signed by student on reverse)*

**Foreign property reporting**

Did you or your spouse hold foreign property with cost of \$100,000+ CAD at any time in year?

Is all income from foreign property reported on a T3 or T5 slip? (If not, enhanced reporting requirements apply)

**Self-employment (unincorporated businesses)**

Self-employed?  Provided electronic data file of *Quick Books* or *Simply Accounting*?

GST/HST return required?  Quick Method used for GST/HST?

Do you do business via a website? If yes, please complete *Internet business activities*

**Administration**

Are there any dates in March or April that you will be away?

Information still to come (provide additional information below)

\_\_\_\_\_

\_\_\_\_\_

This information is being voluntarily collected in accordance with our Privacy Policy as outlined in our personal income tax return engagement letter.

**Tax Partners Inc.**  
**Client intake questionnaire (one per family)**

**Information pertaining to separation and divorce**

Have you provided us with copy of any agreements (separation, child support, divorce agreement)?

Support payments

Payor

Child support

Recipient

Spousal support

Support payments paid are in agreement with the applicable agreement

*Note: if not, deduction for spousal support may be restricted. Verbal adjustments are not accepted by CRA.*

Recipient's legal fees to establish support, if incurred in 2013

**Information pertaining to children of separated or divorced parents**

**One child** - *in year of separation, either parent can claim "eligible dependant" and "child credit" for the child but it must be agreed to in writing who claims the child* \_\_\_\_\_ will claim our only child

**More than one child** - *in year of separation, each parent may claim the above two credits for one child but it must be agreed to in writing who claims which child* \_\_\_\_\_ will claim child \_\_\_\_\_

\_\_\_\_\_ will claim child \_\_\_\_\_

Children's fitness or arts credits (Receipt limits per child Federal: \$500; Ontario: \$535)  
*Eligible receipts cannot be claimed by more than one person; the total credit claimed by each cannot exceed limit).*

Child care expenses are paid in year.

client pays full child care costs

client pays half of child care costs

other: \_\_\_\_\_

Custody arrangements:

Client has full custody of children

Client has joint custody of children (50/50 basis)

Other: \_\_\_\_\_

*Note: deductible portion of child care is based on custody (if client pays full cost but has joint custody, then only 50% of what was paid is deductible for income tax purposes)*