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## RS Accounting & Tax Services

New Client Questionnaire  
Welcome!

Tax Year(s): \_\_\_\_\_

Please complete the following tax package, and return to RS Accounting & Tax Services at your earliest convenience.

Do you have a copy of your most recent tax return or Notice of Assessment? (Please circle one) YES / NO

### Client Information

Your name (first and last):		SIN:		Phone #:	
Common-law Partner's / Spouse's name:		SIN:		Phone #:	
Your DOB (mm/dd/yyyy):		Common-law Partner's/Spouse's DOB (mm/dd/yyyy):			
Current Address:			Email:		
Marital Status (please choose one):	<input type="checkbox"/> SINGLE	<input type="checkbox"/> COMMON-LAW	<input type="checkbox"/> MARRIED	<input type="checkbox"/> SEPARATED	<input type="checkbox"/> DIVORCED <input type="checkbox"/> WIDOWED

Would you like your tax return filed together or seperately from your common-law partner/spouse?  TOGETHER  SEPARATELY

If marital status changed during the tax year, please specify date of change:

Did you pay or receive any spousal and/or child support during the tax year? If yes, please provide the amount:

### How would you like to receive your Notice of Assessment?

Select all that apply:  By mail  I have access to My Account on the CRA website  I don't wish to receive a Notice of Assessment

### General Income Tax Slip Checklist (select all that apply)

<input type="checkbox"/> T4 - Statement of Remuneration Paid	<input type="checkbox"/> T4A(P) - Canada Pension Plan	<input type="checkbox"/> T5007- Benefits	<input type="checkbox"/> T3 - Trust Income
<input type="checkbox"/> T4A(OAS) - Old Age Security	<input type="checkbox"/> T4E - Employment Insurance	<input type="checkbox"/> T5008- Securities	<input type="checkbox"/> T5 - Investment Income
<input type="checkbox"/> T4A - Statement of Pension	<input type="checkbox"/> T4RSP - RRSP Income	<input type="checkbox"/> T2202 - Tuition	

Did you pay any union or professional dues? If yes, please provide name of organization(s) and amount(s) paid:

### Residence

If you paid rent during the tax year, provide the total amount paid, name of the landlord and the total number of months paid:

If you paid property tax during the tax year, provide a statement of account or total amount:

Did you sell your principle residence during the tax year? If yes, please provide the following:

- Amount it was originally purchased for:

- Amount it was sold for:

What year did you purchase this property?

Did you build a new house or addition during the tax year?

Did you renovate your home to be more accessible for a dependant with health conditions or impairments?

Did you make payments towards a Home Buyers' Plan?

### Dependants

Name:	Relationship to you:	SIN:	Date of birth:
Name:	Relationship to you:	SIN:	Date of birth:
Name:	Relationship to you:	SIN:	Date of birth:
Name:	Relationship to you:	SIN:	Date of birth:

Do any of your dependants have a disability tax credit? (Please circle one) YES / NO

If yes, please provide details:

**Self-Employment Income - T2125**

- Please provide self-employment income (invoices, statement or other)

- Please provide the following expenses/receipts if applicable :

<b>Auto</b>	<b>Meals</b>	<b>Professional Fees</b>	<b>Home Office</b>	<b>Home Expenses</b>
Can only claim % of business use - Fuel - Repairs - Routine maintenance	- Meals within working hours - Meals for meetings	- Accounting - Legal <b>Advertising</b> - Social media - Physical advertisements	- Paper - App subscriptions - Office furniture - Repairs and maintenance - Computer/Printer	Can only claim % of business use of home utilities - Hydro/Heat - Mortgage interest - Repairs and maintenance - Property tax - Internet - Insurance - Water
<b>Materials</b>	<b>Disposal</b>	<b>Other Applicable Expenses</b>		
- Purchases/COGS	- Disposal fees			
<b>Small Tools</b>	<b>Cellphone</b>	- Travel	- Delivery, freight and express	- Rent
- All small tools	Can only claim % of business use	- Business taxes, licenses and memberships	- Utilities	- Bad debt
				- Fuel (other than motor vehicles) - Management and administration fees

**Rental Income**

Did you receive rental income? If yes, please provide a statement of rent received.

**Donations**

Did you make any donations during the tax year? If yes, please provide donation slips.

**Medical**

Did you have any out-of-pocket medical expenses for the tax year?

**Other**

Did you pay interest on any student loans? If yes, please provide amount:

If you're an Ontario senior, do you have public transportation receipts?

Did you make any political contributions during the tax year? If yes, please provide contribution slips.

Did you make installment payments to the CRA? If yes, please provide installment amounts.

How did you hear about us?