



## New Client - Personal Tax Information Sheet

Complete this form and email to: rozita@fcpcgroup.ca

For questions or information, call: (587) 393-8621

### Client Information

Full Name:		Date of Birth:	Social Insurance Number:	
Address:		City, Province, Postal code:		Email:
Phone Numbers:				
Home:		Mobile:		
Are you a Canadian Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No		Are you a United States citizen/Green Card holder? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Do you agree to Canada Revenue Agency providing your name, address and date of birth to Elections Canada for the National Register of Electors? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Current marital status:		<input type="checkbox"/> Married	<input type="checkbox"/> Common-law	<input type="checkbox"/> Widowed
		<input type="checkbox"/> Divorced	<input type="checkbox"/> Separated	<input type="checkbox"/> Single
Did your marital status change in the previous year? If so, indicate type and date of change.				
Type:		Date:		
Did you own assets in the previous year that were located outside of Canada and cost \$100,000 CAD or more ? <input type="checkbox"/> Yes    If yes, go to p. 3 <input type="checkbox"/> No				

### Spousal Information (If Applicable)

Full Name:		Date of Birth:	Social Insurance Number:	
Address:		City, Province, Postal code:		Email:
Phone Numbers:				
Home:		Mobile:		

### Dependants Information (If Applicable)

Full Name:		Date of Birth:	Social Insurance Number:	
Address:		City, Province, Postal code:		Email:
Phone Numbers:				
Home:		Mobile:		

**Dependants Information Cont'd** (If Applicable)

Full Name:		Date of Birth:	Social Insurance Number:
Address:		City, Province, Postal code:	Email:
Phone Numbers:			
Home:		Mobile:	

**Dependants Information Cont'd** (If Applicable)

Full Name:		Date of Birth:	Social Insurance Number:
Address:		City, Province, Postal code:	Email:
Phone Numbers:			
Home:		Mobile:	

**Other Considerations** (If Applicable)

Do you wish to split your pension income with your spouse to reduce combined income tax? <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you dispose of a property last year for which you are claiming a principle residence exemption? <input type="checkbox"/> Yes <input type="checkbox"/> No

**Documents, Slips and Other Income Sources** (Include all that are applicable)

Employment income (T4)	Assets purchased for use in your business
Employment insurance benefits (T4E)	Capital gains/losses
Interest, dividends, mutual funds (T3, T5, T5008)	Alimony and/or maintenance received
Income from profit sharing plan	Universal Child Care payments (RC62)
Old Age Security/ CPP Benefit (T4A-OAS, T4AP)	Rental property revenue and expenses
Other pensions and annuities (T4A)	Business, self-employed income and expenses
Pension income from foreign sources	Limited partnership (financial statements/T5013)
Social assistance income (T5007)	Partnership or joint venture income
Workers Compensation benefits (T5007)	Capital property disposition
Retirement income (T4RSP, T4RIF)	Other income (scholarships, bursaries, grants)

## Foreign Property Reporting (If Applicable)

Canadian tax payers who owned assets in the previous year outside of Canada that cost \$100,000 CAD or more, are subject to disclosure requirements set out by the Canada Revenue Agency.

Please read the statements below and if you answer **YES** to any of the following, you may be subject to the foreign property reporting requirements, which may necessitate the preparation and submission of additional documents to the CRA. Non-compliance with this reporting requirement could result in severe penalties.

To help us determine whether you are subject to this reporting rule, please read the following statements carefully and consider whether any of them applied to you last year.

Funds or intangible property (patents, copyrights, etc.) situated or held outside Canada	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Tangible property situated outside of Canada	<input type="checkbox"/> Yes	<input type="checkbox"/> No
A share of the capital stock of a non-resident corporation held by the taxpayer or by an agent on behalf of the taxpayer	<input type="checkbox"/> Yes	<input type="checkbox"/> No
An interest in a non-resident trust that was acquired for consideration, other than an interest in a non-resident trust that is a foreign affiliate for the purposes of section 233.4 of the Income Tax Act.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
An interest in a partnership that holds a Specified Foreign Property unless the partnership is required to file a T1135	<input type="checkbox"/> Yes	<input type="checkbox"/> No
An interest in, or right with respect to, an entity that is a non-resident	<input type="checkbox"/> Yes	<input type="checkbox"/> No
A property that is convertible into, exchangeable for, or confers a right to acquire a property that is Specified Foreign Property	<input type="checkbox"/> Yes	<input type="checkbox"/> No
A debt owed by a non-resident, including government and corporate bonds, debentures, mortgages and notes receivable	<input type="checkbox"/> Yes	<input type="checkbox"/> No
An interest in a foreign insurance policy	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Precious metals, gold certificates and futures contracts held outside Canada	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### NOTICE:

By submitting this form, you hereby consent to the collection of your personal information by Fay Chrisohou Professional Corporation (FCPC). We will use this information for all your tax and accounting business with FCPC. We will keep a record of your Personal Information, correspondence or comments in a file specific to you. We will utilize, disclose or retain your Personal Information for as long as necessary to fulfill the purposes for which it was collected and as permitted or required by law. We have implemented physical, organizational, contractual and technological security measures to protect your Personal Information from loss or theft, unauthorized access, disclosure, copying, use or modification. We will not disclose your information to unauthorized third parties. It is your responsibility to inform us, in a timely manner, of any changes to the information hereby submitted.