

Date:



2024 PERSONAL TAX INTAKE FORM

LEGAL NAME (as per CRA) SELF & SPOUSE	SIN	DATE OF BIRTH (MM/DD/YY)

Address _____ Postal Code _____

Email _____ Telephone _____

Prov. of residence on Dec. 31, 2024 _____ Marital status _____

If change of marital status in 2024:

Did you dispose or change in use of property in 2024?

Date of Marriage/separation/common-law _____

Total cost of foreign property of more than \$100,000

Are you a Canadian citizen:

Require to pay back Home Buyers Plan LLP?

Direct deposit info in case of a refund: Branch# _____ Institution # _____ Account# _____

Direct deposit info for SPOUSE: Branch# _____ Institution # _____ Account# _____

DEPENDENT CHILDREN AND OTHER DEPENDENTS *(include children over 18 at college/university)*

Name	SIN	Relationship	Net Income in 2024	Date of Birth (MM/DD/YY)	If over 19 & disabled? Nature of infirmity
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_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

INCOME, DEDUCTIONS AND CREDITS

Income Slips: <input type="checkbox"/> T4 <input type="checkbox"/> T3 <input type="checkbox"/> T5 <input type="checkbox"/> T4A <input type="checkbox"/> T4AP <input type="checkbox"/> T4AOAS <input type="checkbox"/> T4RSP <input type="checkbox"/> T4E <input type="checkbox"/> T4RIF <input type="checkbox"/> RC62 <input type="checkbox"/> T5008 <input type="checkbox"/> T5013 <input type="checkbox"/> RRSP					
Stocks/Bonds/Crypto		Employment Expenses: Flat rate method or T2200S or T2200		Donations	
Rental Income – T776		Moving expenses		Medical Expenses	
Self Employed – T2125		Northern resident deduction		Interest expense	
Foreign income		First Time Home Buyer		Union/professional dues	
Tuition fee – Slip T2202A		Childcare expenses		Disability credits	

- Please attach a copy of your 2023 Tax returns and Notice of (Re) Assessment
- If you have paid any installments please attach copies of your latest statement of account from the CRA