

NEW CLIENT - T1 GENERAL INTERVIEW FORM

**** PLEASE PROVIDE US WITH A COPY OF LAST YEAR'S TAX RETURN & CRA ASSESSMENT NOTICE ****

NAME
ADDRESS

PHONE NO. (Res.)

(Bus.)

ADDRESS ON LAST RETURN

RESIDENT OF CANADA ON DECEMBER 31, 2005
S.I.N.

Have you filed a return before? Yes No If yes, for what year?

Date of Birth

Type of Work

Marital Status

Present Employer

Spouse's Name

Spouse's S.I.N.

Spouse's Date of Birth

Spouse's Net Income \$
(If Return not prepared by us)

Spouse includes common-law, (heterosexual and same sex) relationships

Any change in marital status or residency during the year? If yes, date of change

Did you or your spouse hold assets worth more than \$100,000 outside of Canada at any time during the year?
Yes No

DEPENDANTS INFORMATION

Children	Name	Sex (M \ F)	Birth date	Income	SIN #
1.					
2.					
3.					

OFFICE USE ONLY

Date information received

Records description

BalaBoss Set up

Client Code

Lists

Other

Client signed T1013

T1013 Mailed to CRA

Privacy consent signed

Maximizer Set up

T1 New CC TS

Processing Notes

INCOME

Employment			T-4
Old Age Pension			T-4
Canada Pension			T-4A
Other Pension			T-4A
E.I. Benefits			T-4U
Dividends	T-5	Other investment / trust	T3
Interest	T-5	Alimony / Support	

SELF EMPLOYMENT REPORT

Year End (if non calendar)

Name	Income-	Business
Activity		Professional
Location – Address		Commission
		Farming

Reserve Claimed in Prior year on T1139

Capital Gains or Losses

Shares	Bonds	Real Estate
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DEDUCTIONS

AMOUNT

Registered Pension	\$
R.R.S.P./ Labour Sponsored Funds	\$
Alimony / Support	\$
Union or Professional Dues	\$
Child Care Expenses (valid receipts required)	\$
Business Investment Loss	\$
Moving Expenses	\$
Interest Expense - Relating to?	\$
Safe Deposit Box	\$
Accounting Fees	\$
Medical (any 12 months ending in 2005)	\$
Attendant Care Fees	\$
Donations	\$
Tuition Fees - self, spouse, child	\$
Disability Deduction (blind, bed or wheelchair)	\$
Signed T2201- Disability Certificate on file with CRA	\$
Education Deduction - Self or Trsf'd.	\$
Trsf'r'd From	\$
Non-Capital/Capital Losses Prior Years	\$
Political Contributions	\$

CREDITS

Ontario Rent for 2005	\$	Landlord's Name
Property Tax for 2005	\$	Municipality

INSTALMENTS PAID FOR 2005

March 15	\$	June 15	\$
September 15	\$	December 15	\$

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