



2023 Intake Form

Full Name: _____

Phone number: _____

SIN: _____

Date of Birth: _____

Address: _____

Marital Status: Single Common Law Married

Spousal information:

Full Name: _____

SIN: _____

Date of Birth: _____

Address: _____

Spouse net income if we are not completing their tax return: _____



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Spouse net income if we are not completing their tax return: _____

Questions:

- Are you a Canadian Resident: Yes No
- If you answered no, what was your date of entry: _____
- Would you like to receive mail electronically from CRA: Yes No
- Language of correspondence: English French
- Did you own foreign property: Yes No
- Do you have any exempt income under the Aboriginal Act? Yes No
- Do you have Canadian Citizenship? Yes No
- As a Canadian Citizen, do you authorize CRA to give your name, address, DOB and Canadian Citizenship to Elections Canada to update the National Register of Electors?
 Yes No
- Do you receive the disability amount for self or someone else: Yes No
- Do you pay for any digital news subscriptions? Yes No
- Did you pay any interest on a student loan? Yes No
- Did you participate in the Home Buyers program: Yes No
- Did you sell your principal residence? Yes No
- Do you have a Sole Proprietorship? Yes No