

**Tax Return Drop-Off Form**

Please include as much information as possible. If we are preparing returns for someone other than yourself, please include all their tax documents as well. Feel free to email us if you have any questions completing this form. Note: You will need to bring ID when picking up you documents.

**Principal Client Information:**

First Name: \_\_\_\_\_ Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Insurance Number (SIN): \_\_\_\_\_

Date of Birth (YYYY/MM/DD) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Marital Status as of December 31, 2021 (circle):

Single      Married      Separated      Divorced      Common-law      Widowed

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Email: \_\_\_\_\_

Best way to reach you to review return (circle):      Phone      Email

Best time to reach you to review return: \_\_\_\_\_

**Spouse or Common-Law Partner Information (if applicable):**

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Insurance Number (SIN): \_\_\_\_\_ D.O.B (YYYY/MM/DD) \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**Dependents: Children, Parents, etc. (dependent on you and living at the same address)**

First Name	Last Name	DOB YYYY/MM/DD	Relationship (Son, Daughter, Etc.)	Post- Secondary Student? (Y/N)	Disabled? (Y/N)	Net Income (If Any)

**Note: If there is a need to file a tax return for a dependent, a SIN will be required. Please use the back for additional dependents.**

**Additional Information**

- |   |       |
|---|-------|
|   | Y/N   |
| - Are you filing taxes in Canada for the first time?                            | _____ |
| - Are you a Canadian Citizen?   | _____ |
| - Are you self-employed or do you own your business?                            | _____ |
| - Do you own an incorporated business?  | _____ |
| - Do you own rental properties?   | _____ |
| - Did you move to Canada from another country or province within the last year? | _____ |
| - Did you work outside of Canada or receive foreign pensions or other income?   | _____ |
| - Are you claiming employment expenses, like Work-from-Home?                    | _____ |
| - Is this return for a deceased person?   | _____ |