

Tax Partners Inc.
Client intake questionnaire (one per family)

Client Name _____

Date _____

of returns to be prepared: _____

Current email address: _____

How would you like us to contact you?
 (Please provide preferred contact)

<input type="checkbox"/>	Home phone	_____
<input type="checkbox"/>	Cell phone	_____
<input type="checkbox"/>	Work phone	_____
<input type="checkbox"/>	Email	_____

What's new? (tick only those that apply)

Change of address? *If yes, please request and complete our "Change of address form"*

Moving expense claim?

First-time homebuyer credit?

Child born in the year? Date: _____ Name: _____

Representative of deceased taxpayer? *(partner to meet with representative and prepare "Client intake questionnaire for deceased taxpayer")*

<input type="checkbox"/>	Change in marital status?	<input type="checkbox"/> Single	<input type="checkbox"/> Widowed
	Date of change: _____	<input type="checkbox"/> Married	<input type="checkbox"/> Separated <i>(complete separate questionnaire)</i>
	Name change: _____	<input type="checkbox"/> Common-law	<input type="checkbox"/> Divorced <i>(complete separate questionnaire)</i>

Preparing spouse/common-law partner return for first time? *(complete "New client" form for spouse)*

General matters (tick only those that apply)

Have you provided us with all of your RRSPP receipts including all contributions made January 1 to March 3, 2014?

Are you claiming the Ontario Healthy Home Renovation Tax Credit for Seniors?

Will someone other than the taxpayer sign the tax return? *(need copy of Power of Attorney)* (On file) (To come)

Is anyone a US Citizen or Green-Card holder?

US return required? Quebec return required?

Have you provided us with your 2013 Ontario property taxes or rent paid? \$ _____ (Taxes) (Rent)

If we are not preparing spouse's return, we need spouse's net income \$ _____

Pension splitting election? *(if yes, we need to prepare both spouse's returns)*

Tuition & education credit transferred from child? *(if yes, we need tuition receipt signed by student on reverse)*

Foreign property reporting

Did you or your spouse hold foreign property with cost of \$100,000+ CAD at any time in year?

Is all income from foreign property reported on a T3 or T5 slip? (If not, enhanced reporting requirements apply)

Self-employment (unincorporated businesses)

<input type="checkbox"/>	Self-employed?	<input type="checkbox"/>	Provided electronic data file of <i>Quick Books</i> or <i>Simply Accounting</i> ?
<input type="checkbox"/>	GST/HST return required?	<input type="checkbox"/>	Quick Method used for GST/HST?
<input type="checkbox"/>		<input type="checkbox"/>	Do you do business via a website? If yes, please complete <i>Internet business activities</i>

Administration

Are there any dates in March or April that you will be away?

Information still to come (provide additional information below)

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Information pertaining to separation and divorce

Have you provided us with copy of any agreements (separation, child support, divorce agreement)?

Support payments

Payor

Child support

Recipient

Spousal support

Support payments paid are in agreement with the applicable agreement

Note: if not, deduction for spousal support may be restricted. Verbal adjustments are not accepted by CRA.

Recipient's legal fees to establish support, if incurred in 2013

Information pertaining to children of separated or divorced parents

One child - *in year of separation, either parent can claim "eligible dependant" and "child credit" for the child but it must be agreed to in writing who claims the child* _____ will claim our only child

More than one child - *in year of separation, each parent may claim the above two credits for one child but it must be agreed to in writing who claims which child* _____ will claim child _____

_____ will claim child _____

Children's fitness or arts credits (Receipt limits per child Federal: \$500; Ontario: \$535)
Eligible receipts cannot be claimed by more than one person; the total credit claimed by each cannot exceed limit.

Child care expenses are paid in year.

client pays full child care costs

client pays half of child care costs

other: _____

Custody arrangements:

Client has full custody of children

Client has joint custody of children (50/50 basis)

Other: _____

Note: deductible portion of child care is based on custody (if client pays full cost but has joint custody, then only 50% of what was paid is deductible for income tax purposes)