

**2023 PERSONAL INCOME TAX
NEW CLIENT INFORMATION**



GRAHAM SCOTT ENNS^{LLP}
CHARTERED PROFESSIONAL ACCOUNTANTS

** New Clients please provide a copy of previous year's Notice of Assessment and T1 General package*

BASIC PERSONAL INFORMATION				
	CLIENT		PARTNER	
Full Name				
Social Insurance Number	Disability		Disability	
Date of Birth				
Home Address				
Current Marital Status				
Change in Marital Status in 2023?	YES	NO	YES	NO
Main Phone Number				
Additional Phone Number				
E-mail Address <i>(for portal purposes)</i>				
Please indicate how you would like to receive your personal tax return:	By Secure Portal to above Email In paper format		By Secure Portal to above Email In paper format	
Would like to use electronic DocuSign for signature purposes?	YES	NO	YES	NO
INFORMATION ON DEPENDENTS				
Name of Dependent and Relationship	Date of Birth	SIN	Net Income	Disability
				Yes
				Yes
				Yes
				Yes
Do you have investment assets requiring a T1135 to be prepared?	YES	NO	YES	NO
Did you sell your home in 2023?	YES	NO	YES	NO
INFORMATION OF SALE OF PRINCIPAL RESIDENCE *				
<i>* If you have a second property that that would also qualify as a principal residence please inform us.</i>				
Address				
Name of owners if other than Client/Partner				
Year of acquisition				
Total Selling price				

ADDITIONAL INFORMATION				
	Client		Partner	
Are you a Canadian Citizen?	Yes	No	Yes	No
<p><i>If you or your partner are a citizen of a country other than Canada, please discuss this with your primary contact at Graham Scott Enns as there may be additional information required.</i></p> <p><i>This includes US citizens. Please contact your representative.</i></p>				
May we provide information to Elections Canada on your behalf?	Yes	No	Yes	No
May we provide CRA authorization to provide your name and email address to Ontario Health so that they may send you information about organ and tissue donation? <i>This is not consenting to organ and tissue donation.</i>	Yes	No	Yes	No
Did you own Foreign Property with a cost > \$100,000 during 2023?	Yes	No	Yes	No
Are you Self-Employed? <i>If yes, please be sure to supply us with your income & expenses as well as GST/HST information filed or to be filed</i>	Yes	No	Yes	No
Did you purchase a home for the first time during 2023?	Yes	No	Yes	No
Did you make any RRSP withdrawals during 2023 under the Home Buyer's Plan?	Yes	No	Yes	No
Did you make any RRSP withdrawals during 2023 under the Lifelong Learning Plan?	Yes	No	Yes	No
If an individual is deceased, please enter date of death and complete the "Final Return and Estate Checklist"	Date:		Date:	

2023 PERSONAL INCOME TAX CHECKLIST

CRA ASSESSMENTS

Previous year(s) Notice of Assessment
Tax instalments for Current Year

DEDUCTIONS

RRSP Contribution(s)*	Interest and Carrying Charges
Union and Professional Dues	Investment Counsel/Accounting Fees
Child Care Expenses*	Moving Expenses*
Child Care/Support payment Information	T2200 – Employment Expenses (Include List)

PERSONAL INCOME

T4 – Employment Income	T4E – Employment Insurance
Other Employment Income	T4PS – Profit Sharing Plan
Self-Employment Income and Expenses (CPP/EI)	T4RSP – RRSP Income
Rental Income and Expenses	T4RIF – RRIF Income
T4A (OAS) – Old Age Security	T5007 – Social Benefits Payments
T4A (P) – Canada Pension Plan	RC62 – Universal Child Care Benefit
T4A – Pensions and Other	Foreign Pensions

TAX CREDITS

Adoption Expenses	Foreign Employment Income
Public Transit Pass	Charitable Donations*
T2202(A) – Tuition/Education Credit	Medical Receipts (less insurance reimbursements)*
T2201 – Disability Tax Credit	Private Travel/Medical Insurance Plan premiums paid
Caregiver/Disability Amount	First Time Home Buyer's Credit
Student Loan Interest	

INVESTMENT INCOME

T3 – Trust/Mutual Fund Income	Annual Statements (Mutual Funds/Securities)
T5 – Interest and Dividend Income	Trading Summaries (Securities)
T5008 – Securities	Capital Gain/Loss Summaries
T5013 – Partnership Income	Foreign Interest/Dividend Income

OTHER

Rent or Property Tax paid (low income & Seniors)
Tradesperson's Tool Expense

****detailed information and/or official receipts required***