



Individual Client Profile

Filed with us?
 New Prior *Required

Name*
Date of Birth* (yy/mm/dd)
Address*
Phone*
Email
Marital Status* <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Specify: _____ <input type="checkbox"/> Single Parent <input type="checkbox"/> Living common-law
Dependants: (# of Children in Canada under age 18: _____) <u>Name</u> <u>Date of Birth</u> (yy/mm/dd) <u>Gender</u>
<input type="checkbox"/> Rent or <input type="checkbox"/> Property Tax Per month: \$ _____ for _____ months or Total: \$ _____
Medical Total \$
RRSP Total \$
Donation Total \$
Other (Please specify):
<ul style="list-style-type: none">• First time filing tax in Canada or have Business/Rental/Commission income? Please inform the staff.• How did you know about us: 1. Flyer <input type="checkbox"/> 2. Online <input type="checkbox"/> 3. TTC Ads <input type="checkbox"/> 4. Friend <input type="checkbox"/> 5. Other <input type="checkbox"/>

For Office Use only:

Invoice of Individual Tax Return	
Basic up-to 2 slips	\$ 18
Add \$ 1 for every additional slip	
Single Parent add \$ 10	
Spouse outside Canada ¹ or no SIN add \$ 25	
Reporting spouse income only ¹ add \$ 10	
Split pension \$ 35 extra to one person	
Credit Transfer add \$ 25	
Total Fee \$ +HST = \$	

¹ Spouse's Name, Date of Birth, SIN & estimate Income required.

Notes: Each form is considered a slip such as T Slip, Rent, Union Dues, etc. is one slip each. Fee will be charged according to total number of slips. Minimum of **\$55** as accounting fee may apply in case staff is totaling for several slips. Ask client to provide totals. No free services or consultancy please.