

Information Form



Principal Taxpayer Information

Salutation: Mr., Mrs., Ms., etc. Date Of Birth: Year YYYY Month MM Day DD

First (Given) Name: _____ Last (Family) Name: _____

Suite (Apt.): _____ Current Address: Street # – Street Name – Street Type (Rd., St., Ave., Blvd., etc.)

City: _____ Postal Code: M2M 2M2 Phone #: () - Mobile/Landline

Email: example@provider.com Electronic Notice Of Assessment (NOA): Yes No

Are you a Canadian Citizen? Yes No If yes, do you want the voter's registry card? Yes No

Marital Status: Single/Married Changed in Tax Year? Yes No If yes: Month MM Day DD

Spousal /POA Information (If Applicable)

Salutation: Mr., Mrs., Ms., etc. Date Of Birth: Year YYYY Month MM Day DD

First (Given) Name: _____ Last (Family) Name: _____

Email: example@provider.com Electronic Notice Of Assessment (NOA): Yes No

Canadian Citizen? Yes No If yes, do you want the voter's registry card? Yes No

Involuntarily Separated? Yes No Power Of Attorney (POA) for principle taxpayer? Yes No

Dependent Information (If Applicable)

These can be children/grandchildren under 19 years of age, unless infirm or grandparents.

Name: First (Given) – Last (Family) Birthdate: YYYY / MM / DD Infirm? Yes No

Name: First (Given) – Last (Family) Birthdate: YYYY / MM / DD Infirm? Yes No

Name: First (Given) – Last (Family) Birthdate: YYYY / MM / DD Infirm? Yes No

Name: First (Given) – Last (Family) Birthdate: YYYY / MM / DD Infirm? Yes No

Additional dependents can be listed on a separate blank page.

PLEASE READ AND SIGN AUTHORIZATION ON THE NEXT PAGE

Non-Represented Client Intake Information Form



Important

The income tax return is also a benefit return. Even if one or both partners/spouses have no income, one/both tax return(s) should still be completed to register for the required benefit(s). Failure to do so, will result in the loss of remittance by the Goods and Services Tax Credit (GSTC), the Ontario Trillium Benefit (OTB), and/or the Canadian Child Tax Benefit (CCTB).

Authorization

You (the client), as stated within the Principal Taxpayer Information section of this form, is authorizing the company, its employees, and any third parties required; to register, complete, and submit your Income Tax and Benefit Return to the Canada Revenue Agency (CRA) on your behalf.

You (the client) as stated within the Principal Taxpayer Information section, also agree to...

- Provide government issued identification and/or Power of Attorney (POA) authorization upon request,
- Not hold liable, any employee(s) or third-party representative(s) of this company, for any incorrect or omitted information provided by your source documentation, or lack of source documentation,
- Provide the (most current) prior year Notice of Assessment (NOA) / Notice Of Reassessment (NOR),
- Allow us to retain your contact information for subsequent yearly media relations, and
- Understand, we do not guarantee refunds, nor are we responsible for any balances owed to the C.R.A.

We will agree that...

- ✓ We may advise you of any missing information that we may be able to deduce based on the source documentation provided.
- ✓ We can assist in submitting adjustments to tax returns submitted for/by you (or your POA),
- ✓ Unless we are your authorized representative...
 - We do not copy or keep any source documentation utilized in the processing of your (or your POA's) tax filing process, and any notes will be returned to you (or your POA),
 - We do not retain any copies or records of your (or your POA's) submitted tax return(s) past the 48-hour Canada Revenue Agency limitation (after filing of your or your POA's tax filing),

By Signing below, you (or your POA) agree that all information entered is correct,
and agree to all statements made within all the pages.

Principle Taxpayer (POA) Signature

Employee Signature

Principle Taxpayer (POA) Date

Employee Date

Important Note

For the Marital Status of Married or Common-Law, each partner must complete a separate intake form. Also the dependent(s) should be listed on the intake form of the partner that is claiming the Income Tax Credits.