Clear Form

THE TAX GUY

New Client Information

1. Name: (Exactly as used by CRA in letters to you)

   _____

2. Address:

   _____ _____ _____ _____
   Street & Number City/Town Province Postal Code

3. Telephone: _____

4. Birthdate: _____ _____ _____
   Day Month Year

5. SIN: _____

6. Marital Status (on Dec.31st): ◯ Single ◯ Married ◯ Common Law
   ◯ Separated ◯ Divorced ◯ Widowed

   Did your Marital Status change in 2025? ◯ Yes Date of change: _____ _____
   ◯ No
   Day Month

7. Spouse's Name:

   _____

8. Spouse's Birthdate:

   _____ _____ _____
   Day Month Year

9. Spouse's SIN: _____

10. Dependants (name, birthdate, gender, SIN if available):

    _____ _____

    _____ _____

    _____ _____

11. 1st time home buyer in 2025? ◯ Yes ◯ No

12. Sell any property in 2025? ◯ Yes ◯ No (if "yes", then we will speak about details)

Please make sure you also have the following information ready:

13. Receipt for rent paid *or* property tax paid in 2025. Name of Municipality or Landlord.
14. Childcare expense info (daycare)
15. Medical expenses receipts
16. Charitable donation receipts