

Dewar McCarthy & Company

2769 Shawnigan Lake Road
PO Box 392
Shawnigan Lake BC
V0R 2W0 Canada
(p) 1.250.483.4739
(f) 1.250.483.5888

dewar@dewarmccarthy.com

Taxation Year: _____

Sole Proprietor Client Information

Client Information

Name: _____ DBA: _____

Address: _____ Mailing Address: _____

Telephone: _____ Cel Phone: _____

SIN: _____ Business Number: _____

Email: _____

Province of Residence at December 31: _____

Self Employed Yes/No Province of Self Employment: _____

Did you become or cease to be a Canadian Resident in this tax year?

Date of entry to Canada: _____ Date of Departure from Canada: _____

Marital Status

Marital Status at December 31st of Taxation Year

Single: ___ Married ___ Common Law ___ Separated ___ Divorced ___ Windowed ___

If status changed during the tax year, enter date of change: _____

Is this Tax Return being prepared for someone deceased? Yes / No Date Deceased: _____

Spouse/Partner Information

Spouse Name: _____ Spouse SIN: _____

Spouse Date of Birth: _____ Telephone Number: _____

Spouse Net Income: _____

Dependents Information

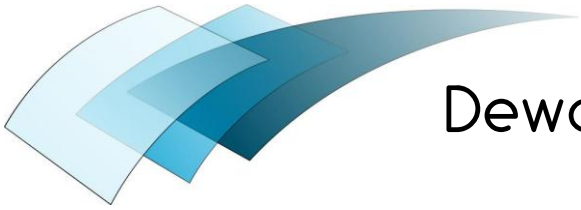
Name: _____ DOB: _____ Relationship: _____ SIN: _____ Income: _____

Name: _____ DOB: _____ Relationship: _____ SIN: _____ Income: _____

Name: _____ DOB: _____ Relationship: _____ SIN: _____ Income: _____

Are you or any of your dependants permanently disabled? Yes / No

If yes has a T2201 (Disability Tax Credit Certificate) been Filed? Yes / No



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Personal Tax Information

Are you a Canadian Citizen?	Yes / No
Has your name changed in this taxation year?	Yes/No
Are you a first time tax filer?	Yes/No
Did you own property outside of Canada over \$100, 000.00?	Yes / No
Is your child transferring post-secondary tuition amount to you?	Yes / No
Did you make Tax Instalment Payments during the year? Amount	Yes / No
Did you participate in the Home Buyer Plan? Date Amount	Yes / No
Did you participate in the Lifelong Learning Plane? Amount	Yes / No
Are you including last years Notice of Assessment?	Yes / No
New Clients – are you including your last year tax return and schedules?	Yes / No
Do you want to be contacted by Elections Canada?	Yes/No
Did the taxpayer receive Pension income?	Yes/No
If “Yes” is the taxpayer eligible to split pension income with spouse/partner?	Yes/No
If “Yes” what was the spouse/partner income during the year? \$ _____	
Would you like your personal tax return to be Efiled?	Yes/NO
Would you like revenue Canada to direct deposit to your account or do you want a cheque? Direct/Cheque	

Bank details required

Branch # 5 digits: _____ **Institution #** 3 digits: _____ **Account #** Max 12 digits _____



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Home office information

Sq/Ft of entire home _____

Sq/Ft of office _____

Sq/Ft of spare bathroom _____

Sq/Ft of Corridors leading to Home office _____

Hydro _____

Telephone _____

Other Utilities _____

Rent/Mortgage

Property Taxes