

Personal Information Sheet

If you are an existing client, please complete the GENERAL INFORMATION section and document any changes to your contact information, marital status or dependants that occurred during the year for which we have not yet been notified. If you are a new client, please provide all the requested information to assist us with preparing your tax return.

If you require additional copies of this information sheet, it is available in the "Client Resources" section of our website at www.ddwca.com.

To ensure our records stay up to date, we ask that you please inform us of any changes to your contact information when they occur.

CONTACT INFORMATION								
Your Name: _____			SIN: _____			Birthdate: (MM/DD/YYYY) _____		
Your Spouse's/ Partner's Name: _____			SIN: _____			Birthdate: (MM/DD/YYYY) _____		
Address: _____ _____						Phone #: _____		
						Fax #: _____		
						Email: _____		
Preferred Method of Communication?			<input type="checkbox"/> Phone		<input type="checkbox"/> Fax		<input type="checkbox"/> Email	
MARITAL STATUS AND DEPENDANTS								
Marital Status (circle one)		Single	Married	Separated	If marital status changed during year, give month/day of change: _____			
		Divorced	Widowed	Common-law				
If we do not prepare your spouse's tax return, please provide their net income for the year (Line 236 of their return)								\$ _____
Dependants								
Please provide the following information for each dependant you financially supported during the year:								
#	Dependant Name (First and Last)	SIN	Gender (M/F)	Date of Birth (MM/DD/YYYY)	Relationship to You	Live with You?	prepare return?	Net Income (\$)
1								
2								
3								
4								
5								
If we are not preparing your dependant(s) return(s) and you wish to claim any unused tuition credits of your dependant(s), please provide a copy of the T2202A (tuition slip) from the recognized educational institution and ensure you provide us with their net income for the year in the space provided above (Line 236 of their return) and a copy of their Schedule 1.								
GENERAL INFORMATION								
Please answer the following questions:			Taxpayer		Spouse/Partner		Dependants	
Are you a Canadian Citizen?			Y	N	Y	N	Y	N
Are you also a citizen of another country?			Y	N	Y	N	Y	N
If yes, what country?			_____		_____		_____	
Did you own foreign property with a cost of over \$100,000 CDN at any time during the year?			Y	N	Y	N	Y	N
Do you authorize CRA to give your name and address to Elections Canada for the voters list?			Y	N	Y	N	Y	N