

Personal Tax Information Form

Please provide us with copies of prior year's tax return AND Notice of Assessments for all family members for whom we are preparing tax returns

Identification

Client full name			
SIN#			
Date of birth			
Mailing address			
E-mail address			
Phone numbers	home	cell	
	bus.	other	
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Marital status

Spouse (if applicable)

Spouse's full name			
SIN#			
Date of birth			
E-mail address			
Phone numbers	home	cell	
	bus.	other	
Are we preparing returns for			
both you and your spouse?			
lf no, please explain			

Dependents

Full Name	SIN# (if applicable)	Date of Birth	Tax Return Requested?



Questions

- 1. How did you hear about us? If someone recommended us, we'd love to thank them if you wouldn't mind telling us who it was
- Are you set up for direct deposit for refunds and/or benefits?
 If no, would you like us to set it up for you, at no additional charge?
- 3. Do you wish to receive communications from CRA via online mail? (note in order to do so you must be set up with "My Account" on the CRA's website)
- 4. Are you ALL Canadian citizens? (circle one) Yes / No If no, who is NOT a Canadian citizen?
- 5. Is there anything else we need to know?



I hereby declare that the information above is accurate. I understand that in the event of any review or audit that I am fully responsible for keeping the receipts to prove such figures or authenticity of items claimed for employment use. Borden Bean Counters is processing my return based only on the figures I have provided and is not responsible for any costs or implications arising from any items that may be disallowed upon any such audit or review.

Signature:		Date	e:	
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