

Welcome to H&R Block! Please fill out the following form. Provide as much detail as possible.

If you have any questions while completing this form, please do not hesitate to ask.

Client Information:

First Name: _____ Initial: _____ Last Name: _____

Social Insurance Number (SIN): _____ - _____ - _____ Date of birth: _____ / _____ / _____ ☐ Female ☐ Male

APT / Unit # _____ Address: _____ PO Box: _____

Rural Route: _____ City: _____ Province: _____ Postal Code: _____

☐ Cell: _____ ☐ Email: _____

☐ Phone: _____ Best time to call: ☐ Daytime ☐ Evening ☐ Weekends

Marital Status on December 31 last year: ☐ Married ☐ Common-law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single

Spouse or Common-law partner information: (if applicable)

First Name: _____ Initial: _____ Last Name: _____

Social Insurance Number (SIN): _____ - _____ - _____ Date of birth: _____ / _____ / _____ ☐ Female ☐ Male

☐ Cell: _____ ☐ Email: _____

Will we be preparing the return for your spouse/partner? ☐ Yes ☐ No Net Income: \$ _____ ☐ Disabled ☐ Student

Dependents*: (if applicable) Children, parents, grandparents, etc. - living at the same address

Last Name	First Name	Date of Birth	Net Income	Relationship	Disabled	Post-Secondary:
		dd/mm/yyyy			<input type="checkbox"/> Yes	<input type="checkbox"/> Student
		dd/mm/yyyy			<input type="checkbox"/> Yes	<input type="checkbox"/> Student
		dd/mm/yyyy			<input type="checkbox"/> Yes	<input type="checkbox"/> Student
		dd/mm/yyyy			<input type="checkbox"/> Yes	<input type="checkbox"/> Student
		dd/mm/yyyy			<input type="checkbox"/> Yes	<input type="checkbox"/> Student

*Require Dependant's SIN during Tax Interview

See reverse for additional space

1. a) **Citizenship** (by birth, bloodline, or naturalization) ☐ Canada ☐ U. S. ☐ Other

b) Lawful **Permanent Resident** (PR card, Green Card) ☐ Canada ☐ U. S. ☐ Neither

c) **PHYSICALLY PRESENT** for at least 183 days per year? ☐ Canada ☐ U. S. ☐ Other

2. Do you have an **incorporated business**? ☐ Yes ☐ No

3. Do you need to complete an **Estate Return** or file for a **deceased person**? ☐ Yes ☐ No

4. Are you **self-employed**, did you **own your own business** or did you work for a **placement agency**? ☐ Yes ☐ No

5. Are you currently in **Bankruptcy status**? ☐ Yes ☐ No

6. Did you **work outside Canada** or have **foreign employment** or **foreign pension** income? ☐ Yes ☐ No

7. Excluding RRSPs, do you have any **investments**, own any **rental properties** or sell your **principal residence** last year? ☐ Yes ☐ No

8. Are you claiming **employment expenses** (did your employer reimburse you for office or vehicle expenses)? ☐ Yes ☐ No

9. Did you **move to Canada** last year or **switch provinces**? ☐ Yes ☐ No

10. Are we preparing **more than one return** for you today? ☐ Yes ☐ No

Do you have a preferred Tax Professional? (Please provide name) _____

Any other information: _____

