

Name	☐ CIS ☐ No Docs ☐ RTE ☐ All Docs										Name
	Net Income:										
DOB	DD - MM - YYYY		SIN	XXX - XXX - XXX		DOB	DD - MM - YYYY		SIN	XXX - XXX - XXX	
DOB	DD - MM - YYYY		SSN	XXX - XX - XXXX		DOB	DD - MM - YYYY		SSN	XXX - XX - XXXX	
Mailing	APT	Address ☐ POA				Other	APT	Address ☐ T1M ☐ T2222			
Contact	City		Prov	Postal		Contact	City		Prov	Postal	
Contact	☐ Cell (____) ____ - ____		☐ Home (____) ____ - ____			Contact	☐ Cell (____) ____ - ____		☐ Home (____) ____ - ____		
Job	☐ Email ☐ CRA					Job	☐ Email ☐ CRA				
Job	☐ IRS					Job	☐ IRS				
Immigration	Citizenship ☐ U.S. ☐ Canada ☐ Other ☐ Green Card Holder					Immigration	Citizenship ☐ U.S. ☐ Canada ☐ Other ☐ Green Card Holder				
	Residency ☐ U.S. ☐ Canada ☐ Other ☐ Female ☐ Male						Residency ☐ U.S. ☐ Canada ☐ Other ☐ Female ☐ Male				
Canadian	Passport #		Visa#	Type: _____		Canadian	Passport #		Visa#	Type: _____	
	Valid: DD - MM - YY		to	DD - MM - YY			Valid: DD - MM - YY		to	DD - MM - YY	
Canadian	☐ T1 ☐ T2 ☐ T3 ☐ H&R Block ☐ Self ☐ Filed ☐ None					Canadian	☐ T1 ☐ T2 ☐ T3 ☐ H&R Block ☐ Self ☐ Filed ☐ None				
	Enter DD - MM - YYYY		Exit	DD - MM - YYYY			Enter DD - MM - YYYY		Exit	DD - MM - YYYY	
Canadian	CIS-ID _____					Canadian	CIS-ID _____				
	☐ Elections? ☐ EAF on file ☐ T1135 ☐ T2201 _____						☐ Elections? ☐ EAF on file ☐ T1135 ☐ T2201 _____				
IRS	☐ French ☐ Non-Resident ☐ Factual ☐ Deemed					IRS	☐ French ☐ Non-Resident ☐ Factual ☐ Deemed				
	☐ Single (Never married) ☐ Widowed ☐ Divorced ☐ Married						☐ Separated ☐ Common-law ☐ QSS ☐ HOH ☐ MFJ				
Last Year	☐ 1040 ☐ 1040NR ☐ H&R Block ☐ Self ☐ Filed ☐ None					Last Year	Previous: Since DD - MM - YYYY				
	CIS-ID _____						Dependant				
Dependant	☐ Dependant ☐ Blind ☐ No Digital Assets ☐ President Election					Dependant	DD - MM - YYYY SSN XXX - XX - XXXX				
	20____ ☐ 1040 ☐ 1040NR ☐ 1116 ☐ 2555 ☐ Fbar/8938						Relationship ☐ ITIN Childcare Expenses				
Tax Preparation	☐ First ☐ 8833 ☐ 8840 ☐ 8843 ☐ 3520 ☐ 8621 ☐ 5471					Tax Preparation	Net Income ☐ AED ☐ Infirm ☐ Split-Custody?				
	SIN XXX - XXX - XXX						SIN XXX - XXX - XXX				
Pricing	DD - MM - YYYY		SSN	XXX - XX - XXXX		Pricing	DD - MM - YYYY		SSN	XXX - XX - XXXX	
	Relationship ☐ ITIN Childcare Expenses		Net Income ☐ AED ☐ Infirm ☐ Split-Custody?		Relationship ☐ ITIN Childcare Expenses		Net Income ☐ AED ☐ Infirm ☐ Split-Custody?				
Pricing	☐ T4 ☐ T4A(P) ☐ T5 ☐ T3					Pricing	☐ T4 ☐ T4A(P) ☐ T5 ☐ T3				
	☐ T4A ☐ T4A(OAS) ☐ RRSP ☐ T5008						☐ T4A ☐ T4A(OAS) ☐ RRSP ☐ T5008				
Pricing	☐ T4E ☐ T4RIF ☐ T4RSP ☐ Rental					Pricing	☐ T4E ☐ T4RIF ☐ T4RSP ☐ Rental				
	☐ T5007 ☐ 1099-R ☐ 1099-Int ☐ Business						☐ T5007 ☐ 1099-R ☐ 1099-Int ☐ Business				
Pricing	☐ W-2 ☐ 1099-SSA ☐ 1099-Div ☐ 1099-Nec					Pricing	☐ W-2 ☐ 1099-SSA ☐ 1099-Div ☐ 1099-Nec				
	☐ 1099-G ☐ _____ ☐ 1099-Misc ☐ 1099-V						☐ 1099-G ☐ 1042-S ☐ 1099-Misc ☐ 1099-V				
Pricing	☐ NR4 ☐ 1042-S ☐ T5018 ☐ T2202 ☐ 1098-T					Pricing	☐ Other: _____ ☐ T5018 ☐ T2202 ☐ 1098-T				
	☐ Moving ☐ Employment Expenses ☐ Donations ☐ Medical						☐ Moving ☐ Employment Expenses ☐ Donations ☐ Medical				
Pricing	20__ \$		20__ \$		Pricing	20__ \$		Time		Contact made	
	\$		\$			\$				DD - MM - YY	
Pricing	☐ POM \$		Fbar \$		Pricing	☐ POM \$				DD - MM - YY	
	Hours \$		Hour \$			Hourly \$				DD - MM - YY	
Pricing	GST \$		GST \$		Pricing	GST \$				DD - MM - YY	
	Total \$		Total \$			Total \$				DD - MM - YY	
Pricing	☐ In-Office ☐ RTE ☐ AdobeSign ☐ In-Office ☐ AdobeSign					Pricing	☐ In-Office ☐ RTE ☐ AdobeSign				
	Appt DD - MM - YY		Appt DD - MM - YY		Drop DD - MM - YY				DD - MM - YY		
Pricing	Drop DD - MM - YY		Extend DD - MM - YY		Pricing	Appt DD - MM - YY				DD - MM - YY	
	All Docs? DD - MM - YY		Review DD - MM - YY			All Docs? DD - MM - YY				DD - MM - YY	
Pricing	T1 Paid DD - MM - YY		US Paid DD - MM - YY		Pricing	T1 Paid DD - MM - YY				DD - MM - YY	
	Signed DD - MM - YY		Signed DD - MM - YY			Signed DD - MM - YY				DD - MM - YY	
Pricing	T1 Efile DD - MM - YY		US Efile DD - MM - YY		Pricing	T1 Efile DD - MM - YY				DD - MM - YY	

<i>Income</i> - Year: 20__	CAD	USD

Deductions

Taxes

Income Tax		
EI Tax		
Social Security/Medicare		

Notes

Bank/Description
CAD\$ USD\$
Bank/Description
CAD\$ USD\$
Bank/Description
CAD\$ USD\$
Bank/Description
CAD\$ USD\$
Bank Address
City Prov Postal

<i>Income</i> - Year: 20__	CAD	USD

Deductions

Taxes

Income Tax		
EI Tax		
Social Security/Medicare		

Client Contact History

DD/MM 00:00	2025-01-23
DD/MM 00:00	
DD/MM 00:00	
DD/MM 00:00	
DD/MM 00:00	
# Bank/Description	
CAD\$ USD\$	
# Bank/Description	
CAD\$ USD\$	
# Bank/Description	
CAD\$ USD\$	
# Bank/Description	
CAD\$ USD\$	
Bank Address	
City Prov Postal	