Choquette & Company Accounting Group Inc.
Personal Tax Information
This form must be submitted with all tax returns

Welcome to the Choquette & Company Accounting Group Inc. client information form. This form is meant to help you put together your tax information for either submission to our office by fax, smartphone or for our onsite tax appointment.

Please complete all applicable area's and use the checklist on the bottom of page 2 prior to submission to our office. Please note our office will contact your prior to processing your credit card with the results of the return and to confirm the applicable fee. Please note that you will also be required to sign and return the T183 E-File consent form to our office upon receipt.

Tax Year: 2021

E-mail:

Mr/Ms: ○ Mr ○ Mrs ○ Ms

Social Insurance Number:

First Name:

Last Name:

Address:

City:

Prov:

Postal Code:

Date of Birth:

Main Phone:

Alt Phone:

Marital Status Dec 31st:

Date of Marital Change:

Disability Tax Credit: ☐ Yes

Are you on: ☐ Facebook ☐ Linked In ☐ Google+

Additional Info:

Spouse Information

E-mail: ____ Are you on ☐ Facebook ☐ Linked In ☐ Google+

Social Ins No: ____

First Name: ____ Last Name: ____

Address: ____

City: ____ Prov: ____

Postal Code: ____ Date of Birth: ____

Main Phone: ____ Alt Phone: ____

Dependents

Dependents include any dependent that live and relies on your care giving including children, parents or grandparents etc. Include any T4, T5 or any other slips

First Name 1: ____ Last Name 1: ____

Date of Birth 1: ____ Social Ins # 1: ____

Net Income 1: ____ Disability Tax Credit 1 ☐ Yes

First Name 2: ____ Last Name 2: ____

Date of Birth 2: ____ Social Ins # 2: ____

Net Income 2: ____ Disability Tax Credit 2 ☐ Yes

First Name 3: ____ Last Name 3: ____

Date of Birth 3: ____ Social Ins # 3: ____

Net Income 3: ____ Disability Tax Credit 3 ☐ Yes

If you have additional dependents please provide the above fields of information for each additional on a separate attached piece of paper.

Income Sources - Attach include the associated slips or provide the information

Income

- ☐ Employment Income (attach T4, T4A slips or details)
- ☐ Pension Income (attach T4AP, T4OAS, T4A, T4RIF slips or details)
- ☐ RRSP withdrawn (attach T4RSP slips or details)
- ☐ Investment Income (attach T3, T5, T600 slips or details)
- ☐ Capital gains/losses (detail of gains or losses) *
- ☐ Rental income/loss (Detailed revenue and expenses by property) *
- ☐ Self employment income/loss (Detailed revenue and expenses) *
- ☐ Farming income/loss (Detailed revenue and expenses) *
- ☐ Fishing income/loss (Detailed revenue and expenses) *
- ☐ Limited partnership income/loss (attach T5018 or details)
- ☐ WCB Income (attach T5008 or details)
- ☐ Foreign income (attach details in foreign currency)
- ☐ Alimony/child support received   Amount
- ☐ Other Income   Desc/Amount

* Contact our office for specialized forms

Additional Info

Deductions and Tax Credits - Attach slips and/or include amounts

- ☐ RRSP Contributions (attach RRSP slips)
- ☐ Professional and Union dues (not on T4). Amount ______
- ☐ Charitable Donations (attach receipts) Amount ______
- ☐ Medical expenses within year. Amount ______
- ☐ Repayment of EI Benefits (attach T4E slips)
- ☐ Child care expenses. Amount ______
- ☐ Education expenses (attach T2202 slips or note online school login below)
- ☐ Moving expenses *
- ☐ Employment expenses (expense details & T2200) *
- ☐ Alimony and/or Tax Deductible Child support paid. Amount ______
- ☐ Interest/Investment carrying charges.(provide details)
- ☐ Disability deduction (attach Form T2201 and mark disability above Page 1-2)
- ☐ Provincial Tax Credit (Red Seal or other credits include details)
- ☐ Losses during the year. (attach details)

* Contact our office for specialized forms which are available

Other Info

Additional Tax Info

- ☐ T1 Personal tax installments paid in tax year. Amount ________
- ☐ Losses from previous years. (attach details).
- ☐ Prior reassessments. (Attach reassessment notices).
- ☐ Prior T1 Refund interest Amount ________

Additional Info

Go through the checklist to double check you have filled/checked-off all the applicable fields. The more information you provide allows your dedicated accountant to provide the best outome.

Complete the following checklist:

- ☐ 1: Enter your personal information
- ☐ 2: If applicable, enter your spouses information
- ☐ 3: If applicable, enter your dependents information
- ☐ 4: Check off sources of income and include slips/info
- ☐ 5: Check off deductions/credits and include slips/info
- ☐ 6. If sending by e-mail, **Click to Send E-Mail staff@CanAcct.com Now**
- ☐ 7. If sending by fax, fax to 1-888-315-5688 with your information. Call the office M-F 9am-1pm 604-463-8202 (local) or 1-888-35-5688 (toll-free) to confirm receipt.
- ☐ 8. If you want an Zoom Appointment, **Click to Book Online or ☎604-463-8202 or ☎1-800-667-9254**
- ☐ 9. Other Online Video Appointments, **Click to Book Online or ☎604-463-8202 or ☎1-800-667-9254**
- ☐10. If you want a Phone Appointment, **Click to Book Online or ☎604-463-8202 or ☎1-800-667-9254**
- ☐11. If want an onsite tax appointment call right away at 604-463-8202 (local) or 1-800-667-9254 (toll-free)