

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 areas, including the checklist, before submission to our office. Please note our office will provide your prior tax results by e-mail. Please note that you must also sign and return the T183 E-File consent and our firm's engagement letter to our office upon receipt.

Submit your Tax Information of Book Appointment Online: [Taxes.CanAcct.com](https://www.taxes.canacct.com)

Tax Year E-mail

Mr/Ms Social Insurance Number

First Name Last Name

Address

City Prov

Postal Code Date of Birth (yyyy-mm-dd)

Main Phone Alt Phone

Marital Status Date of Marital Change
Dec 31st

Disability Tax Credit Yes
Are you on: Facebook Twitter
 LinkedIn Pinterest
 Instagram TikTok

Additional Info

Phone Numbers: **☎ 604-463-8202 or 250-447-9255 Toll-Free: 1-800-667-9254 (Canada/USA)**

Spouse Information

Account Name

Spouse E-mail	<input type="text"/>	<input type="checkbox"/> Facebook
		<input type="checkbox"/> LinkedIn
		<input type="checkbox"/> Instagram
	Are you on	<input type="checkbox"/> Twitter
		<input type="checkbox"/> Pinterest
		<input type="checkbox"/> TikTok
Social Ins No	<input type="text"/>	
First Name	<input type="text"/>	Last Name <input type="text"/>
Address	<input type="text"/>	
City	<input type="text"/>	Prov <input type="text"/>
		<input type="text"/>
Postal Code	<input type="text"/>	Date of Birth <input type="text"/>
Main Phone	<input type="text"/>	Alt Phone <input type="text"/>

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	<input type="text"/>	Last Name 1	<input type="text"/>
Date of Birth 1	<input type="text"/>	Social Ins # 1	<input type="text"/>
Net Income 1	<input type="text"/>	Disability Tax Credit 1	<input type="checkbox"/> Yes
.....			
First Name 2	<input type="text"/>	Last Name 2	<input type="text"/>
Date of Birth 2	<input type="text"/>	Social Ins # 2	<input type="text"/>
Net Income 2	<input type="text"/>	Disability Tax Credit 2	<input type="checkbox"/> Yes
.....			
First Name 3	<input type="text"/>	Last Name 3	<input type="text"/>
Date of Birth 3	<input type="text"/>	Social Ins # 3	<input type="text"/>
Net Income 3	<input type="text"/>	Disability Tax Credit 3	<input type="checkbox"/> Yes
.....			

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

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Submit Taxes or Book Appointment
[Taxes.CanAcct.com](https://www.Taxes.CanAcct.com)

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

Please go through the checklist a second time to make sure it is as complete as possible. The more information you provide allows your dedicated accountant to provide the best outcome.

Continue with the following:

1. Enter your personal information.
2. If applicable, enter your spouses information (we highly recommend we complete spouses return as well to provide the best family outcome).
3. If applicable, enter your dependents information (if dependent has income, deductions or tax credits we highly recommend we complete these returns to allow for transfers and the best family outcome).
4. Check off source or income and include slips and info.
5. Check off deductions/credits and include slips and info.
6. To Book a Zoom or Other Online video appointment, goto CanAcct.com/T1 or phone our office to book.
7. To Book a Phone appointment, goto CanAcct.com/T1 or phone our office to book.
8. To Book an On-Site Mobile Office appointment, please phone our office to book.
9. Note the appointment date, time and type on the following page.

Submit your Tax Information of Book Appointment Online: Taxes.CanAcct.com

Office Phone Numbers: 📞 Lower Mainland: 604-463-8202

📞 B.C. Interior: 250-447-9255

📞 Toll-Free: 1-800-667-9254 (Canada/USA)

Appointment Date:

Appointment Time:

Appointment Type:

Zoom

Phone

Mobile Office

Other Type:

am

pm

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Notes,
Questions