

# ASAP

## Bookkeeping & Services

PERSONAL TAX INTAKE

YEAR .....

HAS ASAP BOOKKEEPING FILED YOUR TAXES BEFORE: YES NO

### LET'S GET PERSONAL

NAME: ..... SIN: .....

DATE OF BIRTH: ..... PHONE #: .....

EMAIL ADDRESS: .....

ADDRESS: .....

IS THIS THE ADDRESS CRA HAS ON FILE? YES NO

MARITAL STATUS: ..... DATE OF CHANGE: .....

SINGLE COMMON LAW MARRIED SEPARATED DIVORCED WIDOWED

SPOUSE: ..... SIN: .....

DATE OF BIRTH: ..... PHONE #: .....

EMAIL ADDRESS: .....

SPOUSAL SUPPORT: PAY RECEIVE AMOUNT: .....

### DO ANY OF THESE EXPENSES APPLY TO YOU?

TUITION FEES/STUDENT LOANS FIREFIGHTER MEDICAL MOVING DONATIONS

CHILDCARE BANKRUPTCY T4'S T5'S T4RRSP

DID YOU CONTRIBUTE TO AN RRSP OR TFSA? YES NO

ARE ALL THE RECEIPTS PERTAINING TO THE ABOVE-MENTIONED EXPENSES INCLUDED WITH YOUR PAPERWORK? YES NO

### DETAILS!!!!

ARE YOU NEW TO CANADA? YES NO

DID YOU SELL YOUR PRINCIPAL RESIDENCE? YES NO

DID YOU OPEN A FIRST HOME SAVINGS ACCOUNT? YES NO

DID YOU RUN A SOLE PROPRIETOR BUSINESS? YES NO

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