



Please ONLY fill out the information applicable to you for the year in which we are filing

Have you ever filed a tax return in Canada before? If yes, was it with TaxMax

If this is your first-time filing taxes, please let us know the date of arrival in Canada:

Step A: Principal Client Information:

First Name: Initial: Last Name:

Social Insurance Number (SIN): Date of Birth: Gender:

Address: City: Province: Postal Code:

Phone: Alternate phone number: Email:

Are you a Canadian Citizen?

Marital Status on December 31 last year: Single Married Widowed Separated Divorced

If marital status changed in the year, we are filing please provide the date of change

If deceased, enter date of death:

Are you claiming the disability tax Credit

Have you been confined to a prison or similar institution (check if applicable)

Confined for more than 90 days in the year in which we are filing:

Confined on December 31, of the year in which we are filing, and were there for more than 6 months:

Confined on December 31, of the previous year, and for the first 179 days of the year in which we are filing:

Step B: Spouse or Common Law Partner Information:

If this is your spouse or common-law partners first time filing taxes in Canada, please provide the date of

Entry:

Is your spouse or common-law partner a Canadian citizen?

First Name: Initial: Last Name:

Social Insurance Number (SIN): Date of Birth: Gender:

Use same address as Principal client? If NO, please provide the address:

Address: City: Postal Code: Province:

If your spouse or common law partner do not live in Canada, what country do they live in?

If your spouse or common law partner did not live in Canada for the year in which we are filing what was their income in Canadian Dollars?

If deceased, enter date of death:



Are you claiming the disability tax Credit

Have you been confined to a prison or similar institution (check if applicable)

Confined for more than 90 days in the year in which we are filing:

Confined on December 31, of the year in which we are filing, and were there for more than 6 months:

Confined on December 31, of the previous year, and for the first 179 days of the year in which we are filing:

Step C: Dependents: (if applicable) Children, parents, grandparents, (living at the same address)

First Name	Last Name	Date of Birth mm/dd/yyyy	Social insurance number	Relationship to Principal Client

Step D Income and Employment (for current tax year)

Employment Income

Do you have Employment income T4 or T4A Number of slips to be uploaded

 T4E EI Income Number of slips to be uploaded

 T4PS Profit Sharing Number of slips to be uploaded

- **Do you use your vehicle for work purpose (does NOT include to and from work)**
You can claim vehicle expense if you use your vehicle to visit customers or other business purposes you can not claim vehicle for work purpose if you only use vehicle to drive to and from work premises)
To writeoff vehicle expense provide expense detail fill please fill out the following form (press ctrl form)
- **Did you work from home if Yes, please fill out the following form (ctrl form)**
- **Did employer provide you with T200 Declaration of conditions of Employment**
If yes please upload form
- **Moving Expenses** Did you move more than 40km for work or school if so fill out this form (ctrl form)

Pension Income

Please fill out the boxes below if you have any of the following Pension income:

- T4A pension & other Income Number of slips to be uploaded
- T4AP Canada Pension Plan Number of slips to be uploaded
- T4A-OAS Old Age Security Number of slips to be uploaded
- T4RSP retirement saving plan withdrawal Number of slips to be uploaded
- T4RIF retirement Income Fund withdrawal Number of slips to be uploaded

Spousal Support Payment

Did you receive or paid any **Spousal Support Payments** if so to whom?

Ex Spouse Name	SIN	Received	Paid

Investment Income

- **Do you have any Investment Income**

- T5 Investment Income (Dividends & Interest) Number of slips to be uploaded
- T3 Number of slips to be uploaded
- T5008 Statement of Security Transaction Number of slips to be uploaded
- Statement of Capita; Gains Number of slips to be uploaded

- **Did you sell any crypto currency, if so fill out the following [form](#) (press ctrl form)**
- **Did you borrow money to invest in securities how much to you pay in interest _____?**
- **Did you pay any advisor fees _____?**

Rental Income

- **Do you have any Rental properties? If so please fill out the following [form](#) (ctrl form)**

Fill out one form for each property.

- **Did you sell any Rental Property? Upload details of purchase and sale**

UBER, SKIP, Door Dash other similar Income

Did you have any income from (Uber, Skip, Door Dash, instacard etc)

- Motor Vehicle expense please fill out this [form](#) (press ctrl form)
- House expenses, please fill out this [form](#) (ctrl form)
- Upload Uber, Skip statements and fill [form](#) (ctrl form) report income and expenses

Self employed or Business Income

- Did you use your Motor Vehicle from Business Purposes, if so please fill out this [form](#) (ctrl form)
- House Expense , Did you use your home for Business Purposes, if so please fill out this [form](#) (ctrl form)
- Fill out this form to report Sales and other business expenses [form](#) (ctrl form)
- Did you purchase any new equipment or capital expense for the business this year

Step E: Rent or Property Tax paid

If you paid for rent and have proof of rent paid, please fill out the following chart

	Address	Postal code	Province	Amount Paid
Jan				
Feb				
Mar				
Apr				
May				
Jun				
Jul				
Aug				
Sept				
Oct				
Nov				
Dec				

Additional information

Please enter any additional comments or instructions here.

Once completed, please save and download this form so that you can upload it with your slips to file online.