

Client Intake Form

Personal income tax return · one form per person

Tax year

 Complete only the additional forms that apply to your situation.

1 About you

First name

Initial

Last name

Social insurance number (SIN)

Date of birth (YYYY-MM-DD)

Canadian citizen?

☐ Yes ☐ No

Disability tax credit approved?

☐ Yes ☐ No

Street address (include apt./unit)

City

Province (e.g. ON)

Postal code

Phone

Email

2 Filing history

Have you filed a Canadian tax return before?

☐ Yes ☐ No

Did Tax Max prepare your last return?

☐ Yes ☐ No

First return in Canada? Date you arrived (YYYY-MM-DD)

3 Marital status on December 31

☐ Married

☐ Common-law



Married or common-law?

Open Spouse/Partner Form →

If you selected either option, please also complete this form.

☐ Single

☐ Separated

☐ Divorced

☐ Widowed

You only need this form.

If your status changed during the year, date of change (YYYY-MM-DD)



4 Dependants If it applies

Children or relatives who lived with you. Add more in "Anything else" if needed.

Full name	Date of birth (YYYY-MM-DD)	Relationship to you

5 Your tax slips

Tick each slip you received and include a copy. We take the amounts from your slips.

EMPLOYMENT

- ☐ T4 Employment income
☐ T4A Other income
☐ T4E Employment insurance (EI)
☐ T4PS Profit sharing

PENSION & RETIREMENT

- ☐ T4A(P) Canada Pension Plan
☐ T4A(OAS) Old Age Security
☐ T4A Pension or annuity
☐ T4RSP RRSP withdrawal
☐ T4RIF RRIF withdrawal

INVESTMENTS

- ☐ T5 Interest and dividends
☐ T3 Trust or mutual fund income
☐ T5008 or capital gains statement

Other slips or statements

6 Rent or property tax

For the Ontario Trillium Benefit. List each home you lived in during the year; keep your receipts or tax bill.

Address (incl. postal code)	From (MM/YYYY)	To (MM/YYYY)	You paid		Total paid
			☐ Rent	☐ Prop. tax	\$
			☐ Rent	☐ Prop. tax	\$
			☐ Rent	☐ Prop. tax	\$



7 Situations that need more detail If it applies

Tick any that apply, then click the worksheet beside it. Return completed worksheets with this form.

- | | |
|--|---|
| ☐ My employer gave me a signed T2200 (employment expenses) | Employment Expenses Worksheet → |
| ☐ I used my vehicle for work or business (not just to and from work) | Motor Vehicle Worksheet → |
| ☐ I worked from home, or used part of my home for my business | Work-from-Home Worksheet → |
| ☐ I moved at least 40 km closer to a new job, business or school | Moving Expenses Worksheet → |
| ☐ I had self-employed or gig income (Uber, Skip, DoorDash, Instacart...) | Self-Employed Worksheet → |
| ☐ I bought equipment or other large items for the business this year | |
| ☐ I own a rental property (one worksheet per property) | Rental Property Worksheet → |
| ☐ I sold a rental property this year (please include the purchase and sale details) | |
| ☐ I sold or traded cryptocurrency | Cryptocurrency Worksheet → |

8 Anything else we should know?

Changes this year, questions for us, or more dependants.

9 Confirmation

- ☐ I confirm that the information on this form is complete and correct to the best of my knowledge, and I authorize Tax Max Inc. to use it to prepare my tax return.

Full name

Date (YYYY-MM-DD)

How to return this form

Save your completed form and bring it, along with your tax slips and receipts, to one of our branches.

You can also contact us via [WhatsApp](#) or email Ashraf@tax-max.ca to arrange how to return it.

This form contains sensitive personal information. Please do not submit it through the website's general contact form.

