NVS

2023 PERSONAL INCOME TAX INTAKE FORM

Client First Name:	Client Last Name:
Phone Number:	Email:
Date of Birth:	SIN:

Spouse First Name:	Spouse Last Name:
Phone Number:	Email:
Date of Birth:	SIN:

Address:	City:
Postal Code:	Province:

Wholly Dependent Persons (Any new births or adoptions in the past year)

First	Last	Address (If different)	Relationship	Date of Birth	Disability Yes No
					○ ○
					○ ○
					○ ○

If you are required to file an HST return for your self-employment income, please select the appropriate box below:

I will file my HST return ○ I want NVS to file my HST return ○

Has your marital status changed within the last year? Yes ○ No ○

If yes, please state the change :

Do you own foreign property or investments with a cost base of $100,000 (CAD) or more? If yes, please provide us with the details. Yes ○ No ○

Have you sold your home or cottage within the last year? Yes ○ No ○

If you have, please provide the following details:

Do you want to designate all years owned as your principal residence? Yes ○ No ○

Address: Year Purchased

Sales Proceeds: $ Original Purchase Price: $

If you do not wish to designate all years owned as your principal residence, please provide the additional information below:

Value as of 31 December 1981:

Cost of any additions/improvements before 1981:

Cost of any additions/improvements after 1982:

What years were not occupied by you or your spouse, while you owned the property:

Please complete the following to reflect the documentation you have submitted to us.

INCOME	Client	Spouse	Dependent
Employment – T4	☐	☐	☐
Employment Insurance – T4E	☐	☐	☐
Director's fees and other employment income	☐	☐	☐
Old Age Security – T4A (OAS)	☐	☐	☐
Canada Pension Plan Benefits – T4A(P)	☐	☐	☐
Other income/pensions – T4A	☐	☐	☐
RSP withdrawals – T4 RSP	☐	☐	☐
RIF withdrawals – T4 (RIF documentation)	☐	☐	☐

INVESTMENT INCOME	Client	Spouse	Dependent
T5 (interest/dividends/income on capital gains)	☐	☐	☐
T3 (trust/mutual funds income)	☐	☐	☐
Limited Partnership – T5013	☐	☐	☐
Rental Property (submit details of income, expenses, purchases and sales)	☐	☐	☐

CAPITAL GAINS AND LOSSES	Client	Spouse	Dependent
Detail shares/investments purchased or sold (include foreign investments)	☐	☐	☐
Did you purchase or dispose of any capital properties this year? (submit copies of sales details & original purchase)	☐	☐	☐

OTHER INCOME	Client	Spouse	Dependent
Alimony/child support (provide copy of post 30 April 1998 agreement or election, if not previously provided)	☐	☐	☐
Other income (e.g. stock options, gratuities, annuities, research grants & bursaries, foreign pensions – submit workers' compensation benefits)	☐	☐	☐
Business or professional income (submit details of income & expenses – complete preprinted form)	☐	☐	☐

DEDUCTIONS	Client	Spouse	Dependent
Registered Retirement Savings Plan contributions (submit summary of receipts)	☐	☐	☐
Pension adjustment reversal (form T10)	☐	☐	☐
Annual union/professional dues (submit summary of receipts)	☐	☐	☐
Attendant Care Expenses (submit summary or summary of receipts)	☐	☐	☐
Allowable business investment losses (refer to capital gains/losses above)	☐	☐	☐
Moving expenses (submit summary of summary of receipts) Distance moved to new employment in km's	☐	☐	☐
Alimony or separation allowances paid (include name(s)/address(es) of recipients, submit a copy of the agreement or court order for spousal support, and submit a summary of any related receipts)	☐	☐	☐
Provide receipts / invoices for Ontario Staycation credit	☐	☐	☐
Commission and employment expenses (detail and form signed by employer – T2200 or TL2)	☐	☐	☐
Carrying charges (Interest on money borrowed to earn dividend and interest, investment counselling fees, interest for limited partnership, safety deposit box)	☐	☐	☐
Federal and provincial political contributions (submit summary or receipts)	☐	☐	☐
Charitable donations (submit summary or receipts)	☐	☐	☐
Medical/home accessibility expenses (submit summary of receipts)	☐	☐	☐
Disability deduction for you or your dependent (if first time claiming, attach a T2201 signed by your physician	☐	☐	☐
Tuition fees (attach T2202/T2202A, include amounts which can be transferred from dependent. Form to be signed by student)	☐	☐	☐
Labour-sponsored funds – T5006 Interest paid on student loans (submit national student loan statement reporting slip)	☐	☐	☐
Childcare expense (provide name, SIN and address of provider below and submit receipt summary)	☐	☐	☐

Childcare Provider Name	Provider SIN	Provider Address

OTHER	Client	Spouse	Dependent
Instalments for prior year (submit January or February notice) $ $	☐	☐	☐
Submit details of RRSP, Homebuyers plan, Lifelong Learning Withdrawals, CRA's statement of account, tax free savings account, registered disability savings plan.	☐	☐	☐
Amounts from any distributions or loans from foreign trusts you've received	☐	☐	☐
Do you own or have any crypto currency transactions (Bit-Coin)	☐	☐	☐
Did you sell, move into a home or start to rent your home in 2019? If do please provide details.	☐	☐	☐

New Trust Reporting Requirements:

Under new legislation for trust reporting in Canada, bare trust arrangements are now subject to the filing requirements of a T3 Trust Income Tax and Information return. For further details, please click on the following link: https://nvsaccounting.ca/bare-trust-arrangements-and-the-new-trust-reporting-regime-in-canada/ If relevant, select the check box for the applicable taxpayer.	☐	☐	☐

Office Use Only		
Reviewed By:	Date:	Project #:
Approved By:	Date:	Date Received:
Printed By:	Date:	Existing Client:
Meeting Required: Yes ○ No ○		New Client:
Meeting With:		Corporate Client: