



PERSONAL TAX INFORMATION

SECTION 1 – PERSONAL INFORMATION

Last Name: _____ First Name: _____ S.I.N.: _____ D.O.B. (YYYY/MM/DD): _____

Mailing Address: _____ PO Box: _____ Postal Code: _____

Home Tel: _____ Work Tel: _____ Cell: _____

Email: _____ Preferred Contact Method:
 Home Tel Work Tel Cell Email

SECTION 2 – MARITAL STATUS

Marital Status:
 Married Divorced Common Law Separated Widowed Single

Date of Marriage/Separation/Divorce (YYYY/MM/DD): _____ Date of Death (YYYY/MM/DD): _____ Is N&L doing your spouses taxes?
 Yes NO If yes, then please give details below for spouses

Spouses Last Name: _____ Spouses First Name: _____ Spouses S.I.N.: _____ Spouses D.O.B. (YYYY/MM/DD): _____

SECTION 3 - DEPENDENTS

Do you have any children?
 Yes NO If yes, then please give details below per child

Last Name	First Name	D.O.B. (YYYY/MM/DD):

Who receives Child Care Benefit?

SECTION 4 – ADDITIONAL INFORMATION

Canadian Citizen?
 Yes NO If no, state citizenship/status: _____

Do you have any self-employment income for this tax year?
 Yes NO If yes, please expect a phone call or email from us to gather further information.

As a Canadian citizen do you authorise the CRA to provide your name, address and date of birth to Elections Canada for the National Register of Electors?
 Yes NO

Do you authorise the CRA to contact us to request any supporting documents if the return is selected for a pre-assessment or post-assessment review?
 Yes NO

Is there any other information you wish us to know?

By signing below you acknowledge all information given above in confidence to Numbers & Letters Business Solutions Ltd to be true and accurate.

Client Signature: _____ Date (YYYY/MM/DD): _____