

**Connolly & McNamara, CA's
Client intake questionnaire**

Client Name _____

Date _____

of returns to be prepared: _____

Current email address: _____

How do you want us to contact you? (provide applicable phone #)

| | | |
|--------------------------|------------|-------|
| <input type="checkbox"/> | Home phone | _____ |
| <input type="checkbox"/> | Cell phone | _____ |
| <input type="checkbox"/> | Work phone | _____ |
| <input type="checkbox"/> | Email | |

What's New? (tick box only if applicable)

Change of address? *If yes, please request and complete our "Change of address form"*

Moving expense claim?

First-time homebuyer credit?

Child born in the year? Date: _____ Name: _____

Deceased taxpayer? *(partner to meet with client's representative and prepare "Client intake questionnaire for deceased taxpayers")*

Change in marital status?

| | | | |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | Single | <input type="checkbox"/> | Widowed |
| Date: _____ | <input type="checkbox"/> | <input type="checkbox"/> | Separated <i>(complete section below)</i> |
| Name change: _____ | <input type="checkbox"/> | <input type="checkbox"/> | Divorced <i>(complete section below)</i> |
| <input type="checkbox"/> | Common-law | | |

Preparing spouse/common-law partner return for first time? *(complete "New client" form for spouse)*

General matters (tick box only if applicable)

Did you or your spouse hold foreign property with cost of \$100,000+ CAD at any time in year?

Direct deposit with CRA: please register me for this *(need void cheque for each individual)*

Someone other than the taxpayer will sign the T1 return? *(need copy of Power of Attorney)* (On file) (To come)

Is anyone a US Citizen or Green-Card holder?

US return?

Quebec return?

If not preparing spouse's return, need spouse's net income \$ _____

Pension splitting election? *(if yes, we need to prepare both spouse's returns)*

Self-employment

Self-employed? Provided electronic data file of QB or Simply Accounting

Prepare GST/HST return? Quick Method?

Registered for EI special benefits?

Administration

Are there any dates you are away? _____

Information still to come (provide additional information below)

This information is being voluntarily collected in accordance with our Privacy Policy as outlined in our personal income tax return engagement letter.

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Information pertaining to separation and divorce

Provided us with copy of any agreements (separation, child support, divorce agreement)

Support payments Payor Child support
 Recipient Spousal support

Support payments paid are in agreement with the applicable agreement
Note: if not, deduction for spousal support may be restricted. Verbal adjustments are not accepted by CRA.

Recipient's legal fees to establish support, if incurred in 2011

Children? If applicable, complete items below
One child - in year of separation, either parent can claim "eligible dependant" and "child credit" but it must be agreed in writing who claims child Claim child

More than one child - in year of separation, each parent claim above 2 credits for one child but it must be agreed in writing who claims which child Claim child _____

The eligible expenses for the child fitness and art's activity tax credits are each limited to \$500 per child per year
Claim the credits as per submitted receipts; no one else will be claiming these credits

Child care expenses are paid in year. client pays full child care costs
 client pays half of child care costs
 other: _____

Custody arrangements:
 Client has full custody of children
 Client has joint custody of children (50/50 basis)
 Other: _____

Note: deductible portion of child care is based on custody (if client pays full cost but has joint custody, then only 50% of what was paid is deductible for income tax purposes)