PSG
Chartered
Professional
Accountant

YOUR SUCCESS IS OUR BUSINESS

T1 New Client REGISTRATION

Name **Birthdate** **SIN**

Address

Phone Numbers **Email**

Which Province did you reside in on December 31?

Have you been audited in the past seven years? If YES, what for? _____ Y N

Are you a Canadian Citizen? Y N

Are you a citizen of any other country? If YES – Specify _____ Y N

Do you authorize CRA to provide your personal information to Elections Canada? Y N

Did you own foreign property at any time in the year with a total cost of more than $100,000 CDN? Y N

Documentation

Provide for each tax payer:

- ☐ Photo identification: driver's license or passport (passport preferred)
- ☐ Prior Year Tax return
- ☐ Prior Year Notice of (Re)Assessment

Marital Status

☐ Married ☐ Common-Law ☐ Divorced ☐ Widowed ☐ Separated ☐ Single

Did the status change in the year? Y N If YES, date of change

Spouse name Birthday: SIN

If married or common-law, will we be preparing their income tax return? Y N

If YES: Have they been audited in the past seven years? If YES, what for? _____ Y N

Are they a Canadian Citizen? Y N

Are they a citizen of any other Country? If YES – Specify _____ Y N

Do you authorize CRA to provide your personal information to Elections Canada? Y N

Dependants

Do you have any dependants? If Yes please provided the following

Names / Relationship / DOBs / SINs

If the dependents have income, will we be preparing their income tax return? Y N

If YES: Have they been audited in the past seven years? If YES, what for? _____ Y N

Are they a Canadian Citizen? Y N

Are they a citizen of any other Country? If YES – Specify _____ Y N

Do they authorize CRA to provide their personal information to Elections Canada? Y N