

Individual Client Profile

| Filed with us? | |
|----------------|-----------|
| ☐ New ☐ Prior | *Required |

| Name* | | | |
|--|-----------------------------|--|--|
| Date of Birth* (yy | /mm/dd) | | |
| Address* | | | |
| Phone* | | | |
| Email | | | |
| Marital Status* | ☐ Single ☐ Single Parent | ☐ Married☐ Specify:☐ Living common-law | |
| Dependants: Name | | (# of Children in Canada under age 18:) Date of Birth (yy/mm/dd) Gender | |
| □ Rent or □ Pro | | month: \$ for months Total: \$ | |
| Medical <i>Total</i> | \$ | | |
| RRSP Total | \$ | | |
| Donation <i>Total</i> | \$ | | |
| Other (Please spe | cify): | | |
| First time filing tax in Canada or have Business/Rental/Commission income? Please inform the staff. How did you know about us: 1. Flyer □ 2. Online □ 3. TTC Ads □ 4. Friend □ 5. Other □ | | | |

For Office Use only:

| Invoice of Individual Tax Return | | | |
|--|-------|--|--|
| Basic personal tax | \$ 18 | | |
| Add \$ 2 for each slip | | | |
| Single Parent add \$ 10 | | | |
| Spouse outside Canada ¹ or no SIN add \$ 25 | | | |
| Reporting spouse income only ¹ add \$ 10 | | | |
| Split pension \$ 35 extra to one person | | | |
| Credit Transfer add \$ 25 | | | |
| Total Fee \$ +HST = | \$ | | |

¹ Spouse's Name, Date of Birth, SIN & estimate Income required.

Notes: Each form is considered a slip such as T Slip, Rent, Union Dues, etc. is one slip each. Fee will be charged according to total number of slips. Minimum of **\$55** as accounting fee may apply in case staff is totaling for several slips. Ask client to provide totals. No free services or consultancy please.