



INCOME TAX 2023 - INTAKE FORM

IMPORTANT: This form helps us capture all aspects of your return.

YOUR INFORMATION:

(Last Name):

(First Name):

(Middle Initial):

SIN:

DATE OF BIRTH:

Are you a Canadian Citizen?

Yes:

No:

Current Mailing Address:

Current Street Address:

City:

Province:

Postal Code:

Phone:

Email:

Marital Status:

Married:

Single:

Divorced:

Widowed:

Seperated:

Did your Marital Status change in 2023? Yes:

No:

If Yes, what Date?

On December 31st 2023, which Province or Territory were you living in?

Are you submitting RRSP contributions?

Yes:

No:

What is your limit?

Did you Immigrate to Canada in 2023?

Yes:

No:

If Yes, what is your Date of Entry?

Have you Declared Bankruptcy in the last five (5) years?

Yes:

No:

If Yes, what is your Date of Discharge?

** If not Discharged, we cannot do your return.

SPOUSE INFORMATION:

(Last Name):

(First Name):

(Middle Initial):

SIN:

DATE OF BIRTH:

Canadian Citizen?

Yes:

No:

DEPENDENT INFORMATION (CHILDREN UNDER 18 YEARS OLD):

(Child Last Name):

(First Name):

(Date of Birth):

(Child Last Name):

(First Name):

(Date of Birth):

(Child Last Name):

(First Name):

(Date of Birth):

(Child Last Name):

(First Name):

(Date of Birth):

Do you or a Family Member have the DTC
(Disability Tax Credit) filed and accepted by CRA?:

Yes (I have an Eligibility Letter T2201 accepted by CRA): No:

Do you live in a Northern Zone?

Yes - Zone B (Flin Flon, Creighton etc): Yes - Zone A (NWT, Etc): No:

If Yes, for how many days in 2023?:

If you live in Manitoba and paid rent in 2023, please provide the amount:

The Addresses you Resided at:

Landlord's Name:

To ensure that your return is completed promptly and accurately, please verify that you have all the necessary information below that applies to your situation:

Information Slips

- T4 - Salary and wages
- T4A, T5, T3 - Pension, annuity, and investment income, Canada/Ontario savings bonds
- T4(OAS) - Old age security/ Guaranteed income supplement or spouse's allowance
- T4A(P) - Canada Pension Plan
- T4RSP, T4RRIF - Registered Retirement Savings Plan/Registered Retirement Income Fund Income
- T4E - Employment insurance benefits
- T5007 - Social assistance payments/ Worker's compensation benefits

- RC62 - Universal Child Care Benefit – if applicable
- IF YOU RECEIVED A LUMP-SUM PAYMENT, bring the breakdown statement from the payor
- Receipts for expenses and credits including travel credits (Please total each deduction prior to dropping off)
- Child care expenses and a completed T778, if you have one
- Union dues
- Tuition fees and education amount (T2202)
- Medical expenses (Please make a list & add up all of the receipts to help the preparer)
- Charitable/political donations (Please make a list & add up all of the receipts to help the preparer)
- Other

I understand that Gundersen Bookkeeping will be preparing my income tax return based on the information I have provided. I further understand and agree that Gundersen Bookkeeping will not be held responsible or liable, financially or otherwise, for any errors or omissions that may occur in the preparation of my tax return. If you receive a Notice of Assessment which differs from the tax return as file, Gundersen Bookkeeping will determine if the assessment is correct at no additional charge.

SIGNATURE:

DATE: