

2023 Personal Income Tax

Date: _____ Did you sell your home in 2023? Yes No
Name: _____ If Yes, date of purchase of sold home: _____
S.I.N #: _____ Proceeds on sale of sold home: _____
Date of Birth: _____ Own foreign property in 2023 over \$100,000? Yes No
Address: _____ Did you purchase your first home in 2023? Yes No
_____ If Yes, has your spouse claimed a first time home
_____ buyer's credit in prior years? Yes No

Phone #: _____
Email: _____

NO CHANGE

NO CHANGE

Marital Status: Married Divorced Separated Single Common Law

Did this change in 2023? Yes No

If yes, please provide date of change: _____

Spouse:

Name: _____ **Date of Birth:** _____ **S.I.N #:** _____

Phone #: _____ **Email:** _____

Are we doing their tax return as well? Yes No

If No, please provide their Net Income for 2023: _____

Who will claim the Climate Action Incentive? You Spouse

FLIP OVER

Dependants:

Child Name: _____ Date of Birth: _____ M/F _____

Child Name: _____ Date of Birth: _____ M/F _____

Child Name: _____ Date of Birth: _____ M/F _____

Child Name: _____ Date of Birth: _____ M/F _____

Do all Dependants above reside with you as of Dec 31, 2023? **Yes No**

NO CHANGE

Are you aware of any missing tax slips? Yes No

If Yes, please provide:

Type of slip: _____ **Received On:** _____

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Capital Accounting is making the shift to use less paper; **we will be emailing you your tax return once it's finished** to the email provided above using your Social Insurance Number as the secure password.

We will prepare your 2023 personal income tax return based on the information provided to us. Processing times take up to 2 weeks.

If we do not have all signed forms, or documents needed, or payment on account, we will not file your taxes with the Canada Revenue Agency. This could result in late filing penalties and/or interest. By signing I understand that a reprocessing fee starting at \$75 will be charged if any slips are handed in after Capital Accounting processes my paperwork.

Signature: _____

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