

### 2021 T1 INTAKE FORM

Name: \_\_\_\_\_

Did your personal information change?

Yes  No (If Yes see reverse) ➔

#### INCOME

| Source  | Documents                     |
|---|-------------------------------|
| <input type="checkbox"/> Employment Income                              | (T4 or T4A)                   |
| <input type="checkbox"/> Old Age Security                               | (T4OAS)                       |
| <input type="checkbox"/> Canadian Pension Plan                          | (T4AP)                        |
| <input type="checkbox"/> WCB/Social Assistance                          | (T5007)                       |
| <input type="checkbox"/> EI/CERB/CRB/CRSB/CREB                          | (T4E)                         |
| <input type="checkbox"/> Disposition of shares/<br>Capital Transactions | (Gain/Loss Report)<br>(T5008) |
| <input type="checkbox"/> RRSP/RRIF Income                               | (T4RSP/T4RIF)                 |
| <input type="checkbox"/> Investment Income                              | (T5)                          |
| <input type="checkbox"/> Trust Income                                   | (T3)                          |
| <input type="checkbox"/> US Social Security                             | (Form T1042-S)                |
| <input type="checkbox"/> Rental income                                  | (Receipts/T776)               |
| <input type="checkbox"/> Self-Employment Income                         | (Receipts/T2125)              |
| <input type="checkbox"/> Foreign Income                                 | (Receipts/slips)              |
| <input type="checkbox"/> Other _____                                    |                               |

#### TAX DEDUCTIONS

| Source  | Documents                            |
|---|--------------------------------------|
| <input type="checkbox"/> RRSP/RPP Contributions   | (Receipts)                           |
| <input type="checkbox"/> Union and Professional fees  | (Receipts)                           |
| <input type="checkbox"/> Child Care Expenses  | (Receipts/Caregiver<br>Name and SIN) |
| <input type="checkbox"/> Moving Expenses  | ( <a href="#">T1-M</a> /Receipts)    |
| <input type="checkbox"/> Support Payments   | (Copy of Court Order)                |
| <input type="checkbox"/> Employment Expenses  | (Summary) ( <a href="#">T2200</a> )  |
| <input type="checkbox"/> Employment Expenses<br>(Simplified method: # of __ Days: Work from Home) | (Summary) ( <a href="#">T2200S</a> ) |
| <input type="checkbox"/> Interest/Carrying Charges  | (Fee Summary)                        |
| <input type="checkbox"/> Other _____  |                                      |

#### TAX CREDITS

| Source   | Documents            |
|--|----------------------|
| <input type="checkbox"/> Medical Receipts        | (Receipts/Summary)   |
| <input type="checkbox"/> Donations               | (Receipts)           |
| <input type="checkbox"/> Tuition                 | (Form T2202)         |
| <input type="checkbox"/> Student Loan Interest   | (Receipts/Summary)   |
| <input type="checkbox"/> Disability amount       | (T2201)              |
| <input type="checkbox"/> Volunteer firefighters  | (200 eligible hours) |
| <input type="checkbox"/> Foreign Taxes Paid      | (Receipts/Summary)   |
| <input type="checkbox"/> Home Accessibility Exp. | (Receipts/Summary)   |
| <input type="checkbox"/> First Time Home Buyer   | (Receipts/Summary)   |

#### OTHER TAX INFORMATION

Review of important tax questions ➔

CRA correspondence

Prior Year Notice of Assessment

#### Your Preferred Method of Contact

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

#### Investment Advisor Contact Information

Yes - May we contact them to obtain tax information

Name: \_\_\_\_\_ Institution: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

#### FIRST TIME FILING WITH US?

Previous 3 years Tax Return

Are you a Canadian Citizen?

Are you a Canadian Resident for tax purposes?

Do we have CRA authorization?

### 2021 PERSONAL INFORMATION UPDATE

927A Goldstream Ave, Victoria, BC V9B 2Y2 t:250.478.3230 e:info@pomponio.ca f:250.474.4727 www.pomponio.ca

**2021 T1 INTAKE FORM**

All current and new clients please answer the following questions:

**IMPORTANT TAX QUESTIONS**

- Are you a Canadian Citizen?  Yes  No
- Have you reviewed our 2021 Personal Income Tax Return Information Guide?  Yes  No
- Are you a Canadian Resident for income tax purposes?  Yes  No
- Do you wish to update Elections Canada with your current Address?  Yes  No
- Residents: Do you have foreign property in excess of \$100,000 CDN?  Yes  No
- Non Residents: Do you have Capital Gains/Losses (worldwide)?  Yes  No
- Non Residents: Do you have Capital Gains/Losses in Canada?  Yes  No
- Did you dispose or have a change in use of a property in 2021?  Yes  No
  - If yes, are you claiming a principal residence exemption?  Yes  No

Did your personal information change?  Yes  No (Same as last year)

If YES please update changes below

**CONTACT INFORMATION**

|                     |  |
|---------------------|--|
| First Name _____    | Last Name _____  |
| SIN _____           | Birthdate _____  |
| Phone _____         | Email _____  |
| Address _____       |  |
| Marital Status      | <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widow(er) <input type="checkbox"/> Common Law <input type="checkbox"/> Divorced <input type="checkbox"/> Separated |
|                     | Date of Change _____   |
| Spouse Name _____   |  |
| SIN _____           | Birthdate _____  |
| Income _____        | Email _____  |
| <b>Dependant(s)</b> |  |
| Name _____          | Birthdate _____ SIN _____ Income _____   |
| Name _____          | Birthdate _____ SIN _____ Income _____   |
| Name _____          | Birthdate _____ SIN _____ Income _____   |