



## INCOME TAX INTAKE FORM:

Please send one upload of all documents below to our secure link on our website.

If you are a new client and this is the first year we will be completing your tax return, please provide us with a copy of your previously filed tax return and NOA from the CRA.

Taxpayer's Name		Spouse's Name (If applicable)	
Taxpayer's SIN & Birthdate (yyyy/mm/dd)		Spouse's SIN & Birthdate (yyyy/mm/dd)	
Address			
Taxpayer's Email for DocuSign:		Spouse's Email for DocuSign:	
Taxpayer's Phone:		Spouse's Phone:	
<i>Taxpayer's Checklist</i>		<i>Spouse's Checklist</i>	
<b>ITEM INCLUDED</b>	<b>YES</b>	<b>NOTES</b>	<b>YES</b>
T-slips (T3, T4, T4A, T4E, T4OAS, T4P, T5, T5018, T4RSP, T4RIF, etc.			
Donation Receipts			
RRSP & FHSA Contribution slips			
Medical Receipts			
Child Care Receipts			
Sale of Real Estate?- (Year & Price of purchase and sale) and associated fees			
Did you sell your principal residence (the house you lived in) If Yes - provide Statement of Adjustment from lawyers.			
Investments & cryptocurrency (tax package from broker with foreign reporting and realized gains/loss summary)			
Foreign Property (over \$100,000)			
Employment Expenses? provide T2200 signed by employer (RAL worksheet, excel or all records)			
T2202 Tuition and Enrolment Certificate			
Business (Income and Expenses) - Client provided information (RAL worksheet, excel or all records)			
Interest on money borrowed to invest (Statement or Amounts)			
First Time Home Buyer - Year of purchase			
Did you change the use of your real estate property? (Rental to Principal or vice versa).			

Rental Income (RAL worksheet, excel or all records)			
Short-term rental? Provide business license (or municipal website address indicating business license is not required)			

**DEPENDENT INFORMATION (Under 18 Years old)**

Name	Relationship	Birthdate (yyyy/mm/dd)	Complete dependent's return?
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Are you registered for CRA My Account?

Yes	No
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Do you have Canadian citizenship?

Yes	No
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As a canadian citizen, do you authorize DAL to give your information to Elections Canada to Register for Future Elections?

Yes	No
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**SUMMARY**

Once you have collected the applicable informaton, please forward through our secure link on our website [www.rl.cpa](http://www.rl.cpa). We will prepare your return based on the information you provided to us and electronically file it with the Canada Revenue Agency. It is your responsibility to ensure the accuracy and completeness of this information. We do not audit, review or otherwise verify the accuracy of this information. If you have any questions, please contact [admin@rl.cpa](mailto:admin@rl.cpa)

I confirm the accuracy and completedness of the information provided and agree to the terms outline above.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Comment Section for Tax Preparer: