



2021 PERSONAL INCOME TAX INTAKE FORM

Client First Name:	Client Last Name:
Phone Number:	Email:
Date of Birth:	SIN:

Spouse First Name	Spouse Last Name:
Phone Number:	Email:
Date of Birth:	SIN:

Address:	City:
Postal Code:	Province:

Wholly Dependent Persons (Any new births or adoptions in the past year)

First	Last	Address (If different)	Relationship	Date of Birth	Disability

If you are required to file an HST return for your self-employment income, please select the appropriate box below: I will prepare and file my HST return <input type="checkbox"/> I want NVS to prepare and file my HST return <input type="checkbox"/>	
Has your marital status changed within the last year?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you own foreign property or investments with a cost base of \$100,000 (CAD) or more? If yes, please provide us with the details.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you sold your home or cottage within the last year? If you have, please provide the proceeds:	Yes <input type="checkbox"/> No <input type="checkbox"/>
Were you a first time home buyer during 2021?	Yes <input type="checkbox"/> No <input type="checkbox"/>



Please complete the following to reflect the documentation you have submitted to us.

	Client	Spouse
INCOME		
Employment – T4		
Employment Insurance – T4E		
Director's fees and other employment income		
Old Age Security – T4A (OAS)		
Canada Pension Plan Benefits – T4A(P)		
Other income/pensions – T4A		
RSP withdrawals – T4 RSP		
RIF withdrawals – T4 (RIF documentation)		

	Client	Spouse
INVESTMENT INCOME		
T5 (interest/dividends/income on capital gains)		
T3 (trust/mutual funds income)		
Limited Partnership – T5013		
Rental Property (submit details of income, expenses, purchases and sales)		

	Client	Spouse
CAPITAL GAINS AND LOSSES		
If you have sold any investments, please provide us with the details (include foreign investments and crypto currency or Bit-Coin)		
Did you dispose of any capital properties this year? (submit copies of sales details & original purchase)		

	Client	Spouse
OTHER INCOME		
Alimony/child support (provide copy of post 30 April 1998 agreement or election, if not previously provided)		
Details regarding any foreign income, including from trust.		
Business or professional income (submit details of income & expenses – complete preprinted form)		

	Client	Spouse
DEDUCTIONS		
Are you eligible for the Working from Home deduction as a result from Covid-19? If so, please provide the number of days you worked from home.		
Registered Retirement Savings Plan contributions (submit summary of receipts)		
Pension adjustment reversal (form T10)		
Annual union/professional dues (submit summary of receipts)		
Attendant Care Expenses (submit summary or summary of receipts)		
Allowable business investment losses (refer to capital gains/losses above)		
Moving expenses (submit summary of summary of receipts)		
Distance moved to new employment km's		



Alimony or separation allowances paid (include name(s)/address(es) of recipients, submit a copy of the agreement or court order for spousal support, and submit a summary of any related receipts)				
Commission and employment expenses (detail and form signed by employer – T2200 or TL2)				
Carrying charges (Interest on money borrowed to earn dividend and interest, investment counselling fees, interest for limited partnership, safety deposit box)				
Federal and provincial political contributions (submit summary of receipts)				
Charitable donations (submit summary of receipts)				
Medical/home accessibility expenses (submit summary of receipts)				
Disability deduction for you or your dependent (if first time claiming, attach a T2201 signed by your physician)				
Tuition fees (attach T2202/T2202A or TL1, Form to be signed by student) Should this deduction be claimed by the student or transferred to the parents? _____				
T5006 Interest paid on student loans (submit national student loan statement reporting slip)				
Childcare expense (provide name, SIN and address of provider below and submit receipt summary)				
Childcare Provider Name	Provider SIN	Provider Address		

OTHER	Client	Spouse
Instalments paid, include a CRA statement.		
\$		
\$		