

**PERSONAL INFORMATION SHEET**

**EXISTING CLIENTS:** please complete the general information section below and update the other sections for any changes to your contact information, marital status or dependants that occurred during the year.

**NEW CLIENTS:** please complete **ALL** of the following sections to assist us with preparing your tax return.

**CONTACT INFORMATION**

Your Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: (MM/DD/YYYY) \_\_\_\_\_

Your Spouse's/  
Partner's Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birthdate: (MM/DD/YYYY) \_\_\_\_\_

Address: \_\_\_\_\_ Phone #: \_\_\_\_\_

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

**Preferred Methods of Communication?**  
 For questions regarding your tax return:  Phone  Email  
 For notification that your return is ready for pick-up:  Phone  Email  Courier\*

\* Returns to be couriered will be phoned prior to confirm mailing address and signature service.

**MARITAL STATUS AND DEPENDANTS**

**Marital Status** (circle one)      Single                  Married                  Separated                  If marital status changed during year, give month/day of change: \_\_\_\_\_  
 Divorced                  Widowed                  Common-law

If we do not prepare your spouse's tax return, please provide their net income for the year (Line 236 of their return)      \$ \_\_\_\_\_

**Dependants**  
 Please provide the following information for each dependant you financially supported during the year:

#	Dependant Name (First and Last)	SIN	Gender (M/F)	Date of Birth (MM/DD/YYYY)	Relationship to You	Live with You?	We prepare return?	Net Income (\$)
1								
2								
3								

If you require additional copies of this information sheet, it is available in the "Client Resources" section of our website at [www.ddwca.com](http://www.ddwca.com).  
 To ensure our records stay up to date, we ask that you please inform us of any changes to your contact information when they occur.

**GENERAL INFORMATION**

**Please answer the following questions:**

	Taxpayer		Spouse/Partner		Dependants	
Are you a Canadian Citizen?	Y	N	Y	N	Y	N
Are you also a citizen of another country?	Y	N	Y	N	Y	N
If yes, what country?	_____		_____		_____	
Did you own foreign property with a cost of over \$100,000 CDN at any time during the year?	Y	N	Y	N	Y	N
Do you authorize CRA to give your name and address to Elections Canada for the voters list?	Y	N	Y	N	Y	N