

**CLIENT INFORMATION FORM**

Please provide information for your whole nuclear family (spouse and children at home), even if we are not filing for them.

**We must have a separate email address for each person who will be signing a tax document.**

This allows us to utilize DocuSign to accept e-signatures in our client portal. You do not need to provide an email address for any person for whom we are not providing tax filing services.

FAMILY MEMBER #:	1	2	3	4
LEGAL first name				
LEGAL middle name				
LEGAL last name				
Preferred name/nickname				
Birth name (if different)				
Date of birth				
Gender				
Occupation				
Marital status				
Cell phone #				
Other phone #				
Email				
You only need to provide the following information if you have some connection to Canada. That is, if you are a U.S. person only and have no Canadian social insurance number (SIN) or immigration status, skip this section. PLEASE COMPLETE THIS SECTION IF YOU HAVE A CANADIAN CONNECTION, EVEN IF WE DON'T PREPARE YOUR CANADIAN TAX RETURN.				
Social Insurance #				
Immigration Status				
Years lived in Canada				
Has CRA MyAccount				
You only need to provide the following information if you have some connection to the U.S. That is, if you are a Canadian only and have no U.S. social security number (SSN) or immigration status, skip this section. PLEASE COMPLETE THIS SECTION IF YOU HAVE U.S. CONNECTIONS, EVEN IF WE DO NOT PREPARE YOUR U.S. TAX RETURN.				
Social Security # or ITIN				
U.S. immigration status				
Years lived in U.S.				
Has IRS online account				

If common-law, is either partner currently married to but separated from a former spouse?  
 If yes, describe situation: \_\_\_\_\_

If marital status changed during the year, what was the date of the change? \_\_\_\_\_

Civic Address: \_\_\_\_\_ Preferred Mailing Address (if different): \_\_\_\_\_

Do you own or rent this home?