

2023 Personal Income Tax - Client Intake

(1) For each Taxpayer we are preparing a return for, please provide their name, email and contact phone number.

Name	Email	Phone #

(2) Did your address change at any time during 2023?

Yes No

If **YES** please ensure to provide us your new address.

(3) In 2023, did you sell your Principal Residence ?

Yes No

If **YES** please fill out the Principal Residence Designation Worksheet.

(4) How would you like to sign your documents when we are finished your returns? **(PLEASE SELECT ONE)**

Rightsignature (electronic signature). I would like to receive a link that allows me to type in my signature from my browser. (Very easy to use.)

Please send me my forms in a secure email attachment. I will print them out, sign them and either drop off at the office (during business hours); mail them; or email back as a secure attachment.

If **YES**, please indicate who we should send them (please make sure you have filled in the email address above.)

Please mail the forms to me, I will print them out, sign them and either drop them off at the office (during business hours); mail them; or email back as a secure attachment.

(5) How will you be paying your invoice this year?

Etransfer

Cheque

Square Credit Card Link

(We use Square payment links which require you to input your card # in a browser)