

2025 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 2025?

Yes No

If **YES** please be sure to provide us your new address

(3) In 2025, did you sell your Principal Residence ?

Yes No

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

(4) In 2025, did anyone in your household open or contribute to a First Home Savings Account (FHSA) ?

Yes No

If **YES** please be sure to provide us details.

(5) 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.)

I will come into the office and sign the required documents. (Please note, we are currently unable to offer debit or credit card payment in the office. If you are unable to pay online, you will need to pay by cheque.)

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

Etransfer

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

Cheque