

Ukraine ACCOUNTING & TAX SERVICES (UATS)

G-11605 101 Street NW, Edmonton AB

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 www.ukraineaccountingtaxservices.com

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CLIENT INTAKE SHEET

Once completed, please email this form to info@ukraineaccountingtaxservices.com

Client Information

Full Name: _____

SIN: _____

Date of Birth (DD/MM/YYYY): _____

Residency Status:

- ☐ Canadian Citizen / Permanent Resident
☐ Temporary Resident (Work Permit / Study Permit)
☐ Non-Resident of Canada

Marital Status:

☐ Single ☐ Married ☐ Common-Law ☐ Divorced ☐ Widowed

Address: _____

City: _____ Province: _____ Postal Code: _____

Phone: _____ Email: _____

Spouse Information (if applicable)

Full Name: _____

SIN: _____

Date of Birth: _____

Net Income (from slips if not filing with UATS): \$ _____

Dependents

Name: _____

Date of Birth: _____

Relationship: _____

Net Income (if any): \$_____

Is the dependent attending a post-secondary institution? ☐ Yes ☐ No (If yes, tuition transfer may apply)

Tax Year Information (select all that apply)

- ☐ T4 – Employment Income
- ☐ T4E – Employment Insurance
- ☐ T4A – Pension/Other Income
- ☐ T5 – Investments/Dividends
- ☐ T5008 – Securities/Capital Gains
- ☐ RRSP Contributions (T4RSP, T4RIF)
- ☐ Tuition (T2202)
- ☐ Medical Expenses
- ☐ Charitable Donations
- ☐ Childcare Expenses
- ☐ Support Payments
- ☐ Disability Tax Credit (T2201)
- ☐ T1135 – Foreign Income Verification
- ☐ Other: _____

Rental Income (T776)

☐ Yes ☐ No

If yes:

- Property Address: _____
 - Gross Rent: \$_____
 - Expenses: \$_____
-

Self-Employment Income (T2125)

☐ Yes ☐ No

If yes:

- Business Name: _____
 - Business Type: _____
 - Gross Income: \$_____
 - Expenses: \$_____
 - Business Use of Home Expenses? ☐ Yes ☐ No
 - Vehicle Used for Business? ☐ Yes ☐ No
-

Carry forward Balances

Do you have any of the following unused amounts to carry forward?

- ☐ Tuition Credits
- ☐ Capital Losses
- ☐ RRSP Contributions
-

Other Deductions / Credits

- ☐ Moving Expenses (T1-M)
- ☐ Employment Expenses (T777 / T2200)
- ☐ Union or Professional Dues
- ☐ Donations
- ☐ Medical Expenses
- ☐ Home Office Expenses
-

Residency / Immigration

☐ Became or ceased to be a resident of Canada in the year

Date of arrival/departure: _____

Direct Deposit / Banking Information

☐ I authorize direct deposit using the banking info below:

Institution #: _____ Transit #: _____ Account #: _____

☐ I've already set up direct deposit with CRA

Foreign Property & Cryptocurrency Disclosure

☐ Owned or held foreign assets over \$100,000 CAD during the year

☐ Held or traded cryptocurrency or digital assets

Referral Source

How did you hear about us?

☐ Friend/Family ☐ Facebook ☐ Google ☐ YouTube ☐ Other: _____

Authorization & Signature

I, _____, confirm that the information provided above is complete and accurate to the best of my knowledge and authorize **UATS** to prepare and electronically file my income tax return.

☐ I consent to e-file my tax return

Signature: _____ Date: _____