



NEW CLIENT INFORMATION SHEET

PERSONAL INCOME TAX

S.I.N.: _____

FIRST NAME: _____

LAST NAME: _____

ADDRESS: _____ CITY _____

POSTAL CODE: _____

HOME PHONE: _____ MOBILE _____

WORK PHONE : _____ E-MAIL: _____

Check this box if you would like us to contact you by e-mail regarding your tax return, or to inform of a special promotion at our office ☐

DATE OF BIRTH (YYYY/MM/DD): _____

Are you a Canadian Citizen? (Circle one) Yes No

MARITAL STATUS: (Circle one) Single Married Common-Law Separated Divorced Widowed

Check this box if your marital status has recently changed ☐

If yes, when? _____ (YYYY/MM/DD)

HOW DID YOU HEAR ABOUT CENTAUR ACCOUNTING?

☐ Friend / Family Member

☐ Website

☐ The Better Business Bureau of London (BBB)

☐ Advertisement

☐ Phone Book / Directory

☐ Other Accounting or Professional Firm: _____

☐ Other: _____

PLEASE INDICATE THE YEAR OF THE LAST TAX RETURN YOU FILED: _____

OR: ☐ This is my first time filing a tax return ☐ Do not know



THE FOLLOWING INFORMATION IS REQUIRED IF YOU ARE MARRIED, LIVING COMMONLAW, OR HAVE ANY CHILDREN.

*You do not need to complete fields requiring your spouse's information if he/she files their tax return with us as well.

SPOUSE'S NAME: _____

SPOUSE'S DATE OF BIRTH (YYYY/MM/DD): _____

SPOUSE'S S.I.N.: _____

*SPOUSE'S NET INCOME FOR TAX YEAR: _____

CHILDREN

*Please note that if you wish to claim childcare expenses you must indicate which child they are for. If you are divorced or separated, know that only one parent can claim the child tax credit and/or child tax benefit for each child. If this applies to you, please only print the names of the children that you are claiming on your return.

NAME: _____ DATE OF BIRTH: (YYYY/MM/DD) _____

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NAME: _____ DATE OF BIRTH: (YYYY/MM/DD) _____

OTHER COMMENTS / QUESTIONS FOR TAX PREPARER TO NOTE: