



Signature

» Bookkeeping » Accounting » Tax Filing » Graphic & Web Development » Signage » Project Management & Consulting

Balanced Accounting New Client Agreement

Year(s) Filing

Personal Information	Spouse & Additional Information
Date Received:	Spouse Name:
Client's Name:	Spouse SIN:
Client's SIN:	Spouse Birthdate:
Client's Birthdate:	Marital status Change? Yes      Date:
Address:	Marital Status:
City:	Postal Code:
Province:	Mobile Phone:

Dependant Information (please check all that apply)

Name	Relationship	Date of Birth	SIN	Earns Income	Qualifies for disability	Post-Secondary Education	Attends Daycare / Preschool

Foreign Property/Investments/Stocks		
Did taxpayer own/hold any foreign property?	Yes	No

Prior Year Tax Information		
Notice of Assessment from Canada Revenue Agency last year filed	Yes	No
Tax return(s) from last year filed	Yes	No
Direct deposit - void cheque attached, if not setup	Yes	No
Statement of instalments	Yes	No

Income		
T4 slips	Yes	No
T4A - commission and/or self-employment	Yes	No
T4E - employment insurance	Yes	No
T5007 - social assistance	Yes	No
T4A - pension, retirement, and annuity income	Yes	No
T4AP - Canada pension plan benefits	Yes	No
T4A (OAS) - old age security	Yes	No
T4A(RCA) - retirement compensation arrangements	Yes	No
T4RSP - registered retirement savings plan	Yes	No
T4RIF - registered retirement income fund	Yes	No