



K. K. CHARTERED PROFESSIONAL ACCOUNTANTS

CLIENT

SIN #: _____ Address: _____
First Name: _____ City: _____ Province: _____
Last Name: _____ Postal Code: _____
Date of Birth:(yyyy/mm/dd) _____ Telephone (H): _____, (W): _____

Marital status: [] Married [] Single [] Widowed [] Divorced [] Separated
Are you self-employed? [] YES [] NO Your Province: _____ Landed Date: _____

CLIENT'S SPOUSE

SIN #: _____ Address: _____
First Name: _____ City: _____ Province: _____
Last Name: _____ Postal Code: _____
Date of Birth:(yyyy/mm/dd) _____ Telephone (H): _____, (W): _____

Is he / she self-employed? [] YES [] NO His / Her Province: _____

CLIENT'S DEPENDENT(S)

Table with 4 columns: Name(s), Date of Birth (yyyy/mm/dd), SIN #, Relationship. Contains 4 empty rows for data entry.

INCOME / EXPENSES

- [] RRSP [] RC62 - Universal Child Care benefit [] Carrying Charges & Interest
[] T4 - Employment Income [] Medical expenses [] Donations
[] T4AP - Pension, Retirement, Annuity [] Union & Professional Dues [] T2202 - Tuition fees
[] T4AOAS - Old Age Security [] Children's Fitness Amount [] Student Loan interest
[] T5 - Investment Income [] Child Care expense [] Public Transit Passes
[] T5007 - Statement of benefits [] Moving expenses [] Self Employed
[] T4E - Employment Insurance Income [] Rent Receipt/ Property taxes [] T2200 Declaration of Condition of Employment

DECLARATION FOR PROPERTY TAX CREDIT (RENTAL INFORMATION)

Table with 5 columns: Address, Months, Rent paid, P. Tax, Name of Landlord/Municipality. Contains 3 empty rows for data entry.

DIRECT BANK DEPOSIT INFORMATION

Table with 4 columns: Name of Bank, Institution #, Transit #, Account #. Contains 1 empty row for data entry.

Applicant's Signature _____ Date _____