

# Ayala Enterprises

Registered Professional Accountants

Date: \_\_\_\_\_

Prior Client  New Client

*\*New clients must sign & attach to paperwork*

## DROP OFF SHEET

### Taxpayer Information:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SIN: \_\_\_\_\_ Date of Birth (dd/mm/yyyy): \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_ Canadian Citizen: Yes  No

Marital Status (circle one): Married Single Common-Law Widowed Separated Divorced

Date of Marital status Change: \_\_\_\_\_

### Spouse/Common-Law Partner Information (if applicable):

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SIN: \_\_\_\_\_ Date of Birth (dd/mm/yyyy): \_\_\_\_\_

Net Income (if filing separately) \$ \_\_\_\_\_ Canadian Citizen: Yes  No

### Dependents Information (if applicable):

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ SIN: \_\_\_\_\_

D.O.B: \_\_\_\_\_ Relationship: \_\_\_\_\_ Net Income: \$ \_\_\_\_\_

Post-Secondary Student: Yes  No  Disabled (T2201 on file): Yes  No

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ SIN: \_\_\_\_\_

D.O.B: \_\_\_\_\_ Relationship: \_\_\_\_\_ Net Income: \$ \_\_\_\_\_

Post-Secondary Student: Yes  No  Disabled (T2201 on file): Yes  No

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### Other Information:

Paid Rent  Paid Property Taxes  N/A

Landlords Name (if applicable): \_\_\_\_\_ Amount Paid: \$ \_\_\_\_\_

Address (if different than address provided above): \_\_\_\_\_

Did your dependent attend daycare or camp? Yes  No

Does your employer allow you to claim work expenses (Attach T2200) Yes  No

Did you sell any property last year? Yes  No

Do you own any foreign property over \$100,000 CAD? Yes  No

Are you self-employed or do you own your own business? Yes  No

Do you have an incorporated business? Yes  No

Did you work outside Canada or have foreign income? Yes  No

Were you enrolled in a post-Secondary school last year? (Attach T2202) Yes  No

Do you own any rental properties? (If so, provide income /expense summary) Yes  No

Do you need to complete an Estate return? Yes  No

Do you qualify for the Disability Tax Credit (Attach T2201 DTC) Yes  No

Did you recently move to Canada? (If yes, complete next section) Yes  No

### First Time Filing in Canada

Date you entered Canada (dd/mm/yyyy): \_\_\_\_\_ From (country): \_\_\_\_\_

World-wide Income prior to entering Canada (in CAD) : \_\_\_\_\_

### Additional Information