

# Salt & Summit Solutions Inc.

Victoria, BC, Canada    accounting@saltsummitsolutions.ca

## Personal Tax & Sole Proprietor Bookkeeping — Client Intake

Please complete all applicable sections. Fields can be typed directly into this PDF and saved.  
All information is kept strictly confidential.

### 1. Personal Information

First name

---

Last name

---

Social Insurance No. (SIN)

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Date of birth (YYYY-MM-DD)

---

Marital status

---

Date of status change (if applicable)

---

Home / mobile phone

---

Email

---

Mailing address (street, city, province, postal code)

### 2. Residency & Place of Birth

Place of birth — city

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Country of birth

---

Were you born in Canada?

Yes

No

If NOT born in Canada, date of entry to Canada

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Citizenship

---

Country of tax residency (if not Canada)

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### 3. Spouse / Common-Law Partner (if applicable)

Spouse first name

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Spouse last name

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Spouse SIN

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Spouse date of birth

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Spouse net income for the year

Is spouse also a client?

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## 4. Dependants

List children or other dependants you support.

Name	Date of birth	Relationship
<hr/>	<hr/>	<hr/>
Name	Date of birth	Relationship
<hr/>	<hr/>	<hr/>
Name	Date of birth	Relationship
<hr/>	<hr/>	<hr/>

## 5. Income — Slips & Sources

Check all that apply and attach/upload the corresponding slips.

### Income types

- |                        |                         |
|------------------------|-------------------------|
| Employment (T4)        | Pension / annuity (T4A) |
| OAS (T4A-OAS)          | CPP/QPP (T4A-P)         |
| Investment income (T5) | Trust income (T3)       |
| RRSP / RRIF income     | EI benefits (T4E)       |
| Rental income          | Capital gains / losses  |
| Foreign income         | Other (specify below)   |

Other income details

## 6. Self-Employment / Sole Proprietorship

Complete if you operate an unincorporated business and require bookkeeping.

Business / operating name	Business number (if any)
<hr/>	<hr/>
Type of business / industry	Date business started
<hr/>	<hr/>

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Are you registered for GST/HST/PST? Yes    No

GST/HST number Reporting period (monthly/quarterly/annual)

## Bookkeeping records you maintain

QuickBooks Online	Sage / Xero
Excel / spreadsheets	Receipts / shoebox
Bank & credit card statements	Other (specify below)

Bookkeeping needs / notes (frequency, software access, year covered)

Do you use a home office or personal vehicle for the business? Yes    No

## 7. Deductions & Credits

### Applicable items

RRSP contributions	Union / professional dues
Child care expenses	Medical expenses
Charitable donations	Tuition (T2202)
Moving expenses	Disability tax credit (T2201)
Student loan interest	First-time home buyer

## 8. Foreign Property & Income

Did you own foreign property with a total cost over CAD \$100,000 at any time in the year? (T1135) Yes    No

Do you have foreign bank accounts, investments, or rental property? Yes    No

If yes, describe the foreign property (type, country, approximate cost)

## 9. Authorization & Consent

*I certify that the information provided is accurate and complete to the best of my knowledge, and I authorize Salt & Summit Solutions Inc. to prepare my return / bookkeeping and to act as my CRA representative.*

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Signature

Date

Office use only — Prepared by: \_\_\_\_\_ Date received: \_\_\_\_\_