



INCOME TAX 2025 -INTAKE FORM

IMPORTANT: THIS FORM HELPS US CAPTURE ALL AREAS THAT RELATE TO YOUR TAX RETURN AND WILL REQUIRE YOUR SIGNATURE.

Name: _____
Last Name First Name Middle Initial

SIN: _____ - _____ - _____ DATE OF BIRTH: D: _____ M: _____ Y: _____

Canadian Citizen: Yes No

Current Mailing Address: _____
Apt/Unit # Street # Street Name

City: _____ Province: _____ Postal Code: _____

Phone: _____ Email: _____

Marital Status: Married Common Law Widowed Separated Single Divorce

Did your marital status change in 2025: Yes No If yes, what date? _____
DD/MM/YYYY

On December 31st, 2025 which province or Territory were you living in? _____

Are you submitting RRSP contributions? Yes No What is your limit? _____

Did you immigrate to Canada in 2025? If yes, what is your date of entry _____
DD/MM/YYYY

Have you declared Bankruptcy in the **last five (5) years**? Yes No

SPOUSE INFORMATION

Name: _____
Last Name First Name Middle Initial

SIN: _____ - _____ - _____ DATE OF BIRTH: D: _____ M: _____ Y: _____

Is your spouse a Canadian Citizen? Yes No

DEPENDENT INFORMATION (CHILDREN UNDER 18 YEARS OLD)

Name First Name DOB: _____ Last
Day Month Year

Name First Name DOB: _____ Last
Day Month Year

Name First Name DOB: _ _ Day Month Year Last

Name First Name DOB: _ _ Day Month Year Last

Do you or a family member have the DTC (Federal Disability Credit)? Yes No

Do you live in a Northern Zone? If so, for how many days in 2025? _____

If you live in Manitoba and paid rent in 2025, please provide the amount _____, the addresses you resided at _____

and the landlord's name _____

To ensure that your return is completed promptly and accurately, please verify that you have all the necessary information below that applies to your situation:

❖ Information Slips

- T4 - Salary and wages
- T4A, T5, T3 - Pension, annuity, and investment income, Canada/Ontario savings bonds
- T4(OAS) - Old age security/ Guaranteed income supplement or spouse's allowance
- T4A(P) - Canada Pension Plan
- T4RSP, T4RRIF - Registered retirement savings plan/Registered Retirement Income Fund income
- T4E - Employment insurance benefits
- T5007 - Social assistance payments/ Worker's compensation benefits
- RC62 - Universal Child Care Benefit – if applicable
- IF YOU RECEIVED A LUMP-SUM PAYMENT, bring the breakdown statement from the payor

❖ Receipts for expenses and credits (Please total each deduction prior to dropping off)

- Child care expenses and a completed T778, if you have one
- Union dues
- Tuition fees and education amount (T2202)
- Medical expenses (**Please make a list & add up all of the receipts to help the preparer**)
- Charitable/political donations (**Please make a list & add up all of the receipts to help the preparer**)
- All property taxes or rent paid (**Please make a list & add up all of the receipts to help the preparer**)

❖ Other

- Date of arrival to Canada and status (if a new immigrant)
- Direct deposit information (void cheque/letter from the bank/credit union with your bank information)

I understand that Gundersen Bookkeeping will be preparing my income tax return based on the information I have provided. I further understand and agree that Gundersen Bookkeeping will not be held responsible or liable, financially or otherwise, for any errors or omissions that may occur in the preparation of my tax return. If you receive a Notice of Assessment which differs from the tax return as file, Gundersen Bookkeeping will determine if the assessment is correct at no additional charge.

Signature: _____ Date: _____