Client Information - 2022 TAX YEAR	
Date & Time in: How late can MTS call?	
1013 signed_yes / No T183 signed_Yes / No	
Name	
Is your address the same as last year? Yes / No	
Address If different:	
Best e-mail to contact you	
Male D.O.B Female DOB	
Ph.(hm) (wk./cell His) (wk./cell Hers)	
Marital Status as of 31 Dec. 2022 if marital status changed, date of change	
If changed to CL date you moved in together?	
On. Rent (Rec.Req.)address if dif. from above, & landlord	
Prop. Tax (actual amount. req)	
Approx. Inc. of Spouse (if not filing here) \$ Name: SIN:	
Dependents living with you:	
M \ F Income	
DOB M \ F Income DOB M \ F Income	
N/Fillcome	
Do you authorize pension splitting if either of you collect a pension?	Yes / No
Were any healthy homes renos. done for seniors. (over 65)	Yes / No
Do you or anyone in your family have any type of mental or physical impairment? Family	
be dependent on you for food, clothing, or shelter. Disabilities incl. learning, diabetes, r functions, speaking, hearing, vision etc.:	nental Yes / No
Any childcare expenses, incl. day camp:(name & address of sitter req.)	Yes / No
Any RSP contributions? (RSP's in 1st 60 days must be claimed on this tax return?)	Yes / No
Did you move at least 40kms closer to a new place of employment?	Yes / No

Questions:

Information we are waiting for:

Did you pay or receive spousal support:	
Any capital gains to report:(i.e., did you sell a 2 nd property or stocks?)	
Did you sell your primary res. in 2022? If yes; year purchased, price sold for	Yes / No
Is anyone a volunteer as either a firefighter or search & rescue person?	
Are you a first-time home buyer?	
Any tuition paid for yourself or transferred from a dependent:	
Any med. Exp. (including premiums) totaling over 3% of income:(R.R) If yes reimbursed for any of it?	
Do you have charitable donations?	Yes / No
Any public transit passes–must be 65 as of 1 Jan. 2022.	Yes/ No
Did you subscribe to a Digital News Subscription in 2022:	Yes / No
Any eligible 2022 accommodation expenses for a stay at a hotel, cottage, or campground (Up to \$1,000 for individual and \$2,000 for a family):	
Did you pay any interest on any student or investment loans:	
Union or Professional dues:(R.R.)	
Self Employed? (if new or any changes from last year, go through bus. sheet) If self-employed: are you HST reg any income from web page MTS ***Did you opt into paying El	Yes / No Yes / No Yes / No Yes / No
Rental Income:(if new or any changes from last year, go through rental sheet)	Yes / No
Did you work from home due to COVID-19 in 2022: If Yes, please provide the number of days you worked from home(up to 250).	
Employment Exp.: (teaching supplies for teachers now qualify)	Yes / No
If Yes for employment expenses, T2200 signed:	
OK to give name, address & DOB to Elections Canada:	
Foreign investments worth over CAD \$100,000	
Are you Canadian Citizens	
Any other income to report that's not included above (1013 if not sure)	Yes / No
If you have D.D. with CRA is your banking info. the same as last year?	