

Client Information Form 2025 Tax Year

This package **must be completed in full** before our office can start your tax return.

ONE PACKAGE PER HOUSEHOLD

TAX PAYER 1	Last:	First:	SIN:
Phone:	Birthdate: (YYYYMMDD)		
Email:	Canadian Citizen: Y <input type="checkbox"/> N <input type="checkbox"/>		
May CRA Provide information to elections Canada: Y <input type="checkbox"/> N <input type="checkbox"/>			

MARITAL STATUS	<input type="checkbox"/> Married	<input type="checkbox"/> Common Law	<input type="checkbox"/> Divorced
Date of Status Change in 2025? mm _____ dd _____	<input type="checkbox"/> Separated	<input type="checkbox"/> Widowed	<input type="checkbox"/> Single

TAX PAYER 2	Last:	First:	SIN:
Phone:	Birthdate: (YYYYMMDD)		
Email:	Canadian Citizen: Y <input type="checkbox"/> N <input type="checkbox"/>		
May CRA Provide information to elections Canada: Y <input type="checkbox"/> N <input type="checkbox"/>			

CURRENT ADDRESS:	Do you live in a rental unit and earn less than \$83,000? Y <input type="checkbox"/> N <input type="checkbox"/>
Street:	Landlord Name:
City:	# of Rental Months in 2025:
Province: _____ Postal Code: _____	Rent Per Month:
Did you buy/sell a home in 2025? Y <input type="checkbox"/> N <input type="checkbox"/>	****If yes, please fill out information on next page

DEPENDANTS	Name:	Birthdate (YYYYMMDD)	SIN (if applicable)
1.			
2.			
3.			
4.			

Are you claiming eligible dependent? Y N (You cannot claim if you pay child support)

If single, are you claiming the child tax benefit? Y N

PROVIDED A COPY OF PREVIOUS YEAR NOTICE OF ASSESSMENT or GIVEN CRA ACCESS?	Y <input type="checkbox"/> N <input type="checkbox"/>
Do any of the following apply?	
Split-pension income	Y <input type="checkbox"/> N <input type="checkbox"/> RRSP Home buyers program Y <input type="checkbox"/> N <input type="checkbox"/>
Self-employment	Y <input type="checkbox"/> N <input type="checkbox"/> Foreign pension/income Y <input type="checkbox"/> N <input type="checkbox"/>
Rental income	Y <input type="checkbox"/> N <input type="checkbox"/> Did you open an FHSA in 2025? Y <input type="checkbox"/> N <input type="checkbox"/>
Tuition paid in tax year	Y <input type="checkbox"/> N <input type="checkbox"/> Disability tax credit for any family member Y <input type="checkbox"/> N <input type="checkbox"/>
Bankruptcy in last 7 years	Y <input type="checkbox"/> N <input type="checkbox"/> Name: _____

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*****FILL OUT THE NEXT TWO SECTIONS ONLY IF APPLICABLE

Selling of a home

Principal property the entire period? Y N If yes, disregard the below questions.

Non-principal Residence:

How many years were principal residence vs not?

Purchase price or fair market value at start of non-principal.

Sale price or fair market value at end of non-principal.

Cost and outlays on sale not claimed on prior return.

Buying of a home

Have you owned a home in the last 4 years? Y N

Is the house in joint names? Y N

If yes, who is claiming the credit?

Agreement with First Choice Tax Services (A division of Genx Business Solutions Inc)

Thank you for choosing First Choice Tax Services. This agreement confirms the terms of our engagement to prepare your Canadian personal income tax return(s). We will prepare and electronically file your return(s) based solely on the information and documentation you provide. We do not audit, verify, or independently confirm the accuracy or completeness of the information supplied. You are responsible for providing complete and accurate details of all income, deductions, credits, and other relevant tax information, and for reviewing your completed return(s) prior to filing. You are also responsible for retaining copies of your tax records as required by the Canada Revenue Agency (CRA). By engaging our services, you authorize First Choice Tax Services to act as your authorized representative with the CRA for the purpose of preparing and filing your return(s). All payments made through our secure portal, e-transfers, or by phone are subject to a 5% processing fee. The remaining balance, required signatures, and approvals must be received before your return(s) will be electronically filed. Our liability for services provided is limited to the fees paid for those services, and we are not responsible for penalties, interest, or additional taxes arising from incomplete, inaccurate, or late information provided by you. By signing below, you acknowledge and agree to the terms of this engagement.

I accept the above terms and conditions and authorize First Choice Tax Services (a division of Genx Business solutions Inc.) to prepare my personal income tax return(s).

Signed by:

Date:

Foreign Income Verification Statement (T1135)

Declaration

Please choose one of the following with regards to Foreign Property Held in tax year (foreign property includes funds held outside of Canada, shares of foreign companies even if held in a Canadian brokerage account (not in an RRSP), loans to non-residents, interests in non-resident trusts, real estate outside of Canada (other than personal use real estate) and any other property held outside Canada):

No – I did not have any foreign property with a total cost of more than \$100,000CAD at **any** point in 2025.

Yes – I did have foreign property during 2025 with a total cost of more than \$100,000CAD. I will obtain the required information for First Choice Tax to prepare the form. I understand that the completion of the form is not included in my 2025 quote to prepare my personal tax return and agree to pay the additional fees incurred to prepare the T1135 Form.

Signed by:

Date: