

## New Client Information Sheet (one form per couple)

	Client	Spouse
Name	FIRST	MIDDLE
	FIRST	MIDDLE
	LAST NAME	LAST NAME
Birthdate	DD	MM
	YYYY	YYYY
Marital Status	_____	
Canadian Citizen	_____	
Cell	_____	
Home Phone	_____	
Email	_____	
	May we email and text you? <input type="checkbox"/> Yes <input type="checkbox"/> No	May we email and text you? <input type="checkbox"/> Yes <input type="checkbox"/> No
Street Address	_____ Apt # _____	
City	_____	Postal Code _____
Property Tax \$	_____	Rent \$ _____ Landlord _____
Did you sell your home last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No    Home Buyer's Plan? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Dependant Children's Names:	Birthdates
_____	_____
_____	_____
_____	_____

Additional Information \_\_\_\_\_  
\_\_\_\_\_

How did you hear about us?  Google  Church  Sign  Referred by: \_\_\_\_\_

Please visit [exceltaxservice.ca](http://exceltaxservice.ca) for your complimentary Income Tax Checklist.  
Watch our videos for helpful tips.

**Disclaimer: Your tax return prepared by Excel Tax Service based on the Information provided.**



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**\*\*\*OPTIONAL:** GIVING EXCEL TAX AUTHORIZATION TO REPRESENT YOU MAY BE BENEFICIAL TO YOU IF YOU ARE MISSING SLIPS OR RELEVANT INFORMATION THAT IS REQUIRED TO COMPLETE YOUR TAX RETURN CORRECTLY

## AUTHORIZATION FORM – AUTHORIZE A REPRESENTATIVE

NAME: \_\_\_\_\_ SIN#: \_\_\_\_\_

**I grant Excel Tax Service instant online access to my information for the purpose of preparing my income tax return.**

- 1) Level of Authorization: **2** – includes filing T1 adjustments online
- 2) This authorization can be cancelled at anytime.
- 3) This authorization is ongoing, even after death, unless it is cancelled (By yourself, Excel Tax, or an executor).
- 4) Excel Tax **cannot view or change** your address or direct deposit online.

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

Business Name: Excel Tax Service Inc.  
Business Number: 831445663  
Phone Number: 905-897-1588