

New Client Information Sheet

(one form per couple)

Client

SIN # _____ Marital Status _____

Legal Name _____
FIRST MIDDLE LAST

Street Address _____ Apt # _____

City _____ Postal Code _____

Cell _____ Home Phone _____

Birthdate _____ Date of Death _____
DD MM YYYY DD MM YYYY

Canadian Citizen Permanent Resident Work/Student Visa

Email _____ May we email and text you? Yes No

Property Tax \$ _____ Rent \$ _____ Landlord _____

Did you sell your home last year? Yes No Home Buyer's Plan? Yes No

Have you moved since last filing? Yes No Did you open an FHSA? Yes No

Spouse or Common-Law

SIN # _____ Does not live in Canada

Legal Name _____
FIRST MIDDLE LAST

Cell _____ Home Phone _____

Birthdate _____ Date of Death _____
DD MM YYYY DD MM YYYY

Canadian Citizen Permanent Resident Work/Student Visa

Email _____ May we email and text you? Yes No

Dependant Children's Names

Birthdates

Additional Information _____

How did you hear about us? Google Sign Referred by: _____

Please visit exceltaxservice.ca for your complimentary Income Tax Checklist.
Watch our YouTube videos for helpful tips.

Disclaimer: Your tax return prepared by Excel Tax Service is based on the information provided.



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www.exceltaxservice.ca

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



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AUTHORIZATION FORM – AUTHORIZE A REPRESENTATIVE (FOR SPOUSE OR COMMON-LAW)

NAME: _____ SIN#: _____

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

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