



Sandra Schofield CPA
Professional Corporation

2022 PERSONAL TAX ORGANIZER Returning Clients

Personal Information

Taxpayer: _____

Spouse: _____

Address: _____

Home: _____ Office: _____

Cell: _____ Other: _____

Email: _____ Email: _____

Changes in 2022

Marital Status Change _____
Date _____

Dependants Change
Name _____
Relationship _____
Date of Birth _____

Did you sell your Principal Residence in 2022?
Sale Price \$ _____
Original Purchase Year _____
Address _____

- Please let us know if you own any foreign property costing more than \$100,000 CDN _____
- Do you agree to provide your personal information for Elections Canada?
 - Yes
 - No

Other Information:

_____ |

/We have selected the Basic ___ Enhanced___ Premium___ level of service and understand if additional services not included in this package are required, these will be billed separately.

I certify that all the information that I have provided is true, complete and accurate to the best of my knowledge. I accept that final payment for the preparation of the tax return(s) is due upon completion and prior to any information being submitted to CRA. A deposit of \$60.00 per return is required prior to when work begins.

Signature of person providing information: _____

Date: _____

