Ontario Tax Services
And Accounting Solutions

2300 Lawrence Ave. E. Unit # 3, Toronto ON M1P 2K9
Phone: 416 901 0500 | Email: tax@otsas.ca
www.ontariotaxaccounting.ca

OTSC #: ____ - _____ - _____
(For office use only)

CLIENT INFORMATION FORM

CLIENT INFORMATION

☐ Mr. ☐ Mrs. ☐ Miss.

FIRST NAME _____ LAST NAME _____

DATE OF BIRTH (YYYY/MM/DD) _____ SIN # _____

ADDRESS _____

CITY _____ PROVINCE _____ POSTAL CODE _____

EMAIL _____ TELEPHONE. _____

MARITAL STATUS: ☐ SINGLE ☐ MARRIED ☐ LIVING COMMON-LAW ☐ WIDOWED ☐ DIVORCED ☐ SEPARATED

DID YOUR MARITAL STATUS CHANGED LAST YEAR? ☐ NO ☐ YES

IF YES ENTER DATE (YYYY/MM/DD) _____

SPOUSE & DEPENDENT

☐ Mr. ☐ Mrs. ☐ Miss.

FIRST NAME _____ LAST NAME _____

DATE OF BIRTH (YYYY/MM/DD) _____ SIN # _____

EMAIL _____ ☐ (Same as above) TELEPHONE. _____

DO YOU HAVE DEPENDENT(S) / CHILDREN? ☐ YES ☐ NO

IF YES, HOW MANY? _____

FULL NAME (FIRST NAME LAST NAME) _____ DATE OF BIRTH (YYYY/MM/DD) _____

FULL NAME (FIRST NAME LAST NAME) _____ DATE OF BIRTH (YYYY/MM/DD) _____

FULL NAME (FIRST NAME LAST NAME) _____ DATE OF BIRTH (YYYY/MM/DD) _____

FULL NAME (FIRST NAME LAST NAME) _____ DATE OF BIRTH (YYYY/MM/DD) _____

OTHER DETAILS

ARE YOU FILING TAXES FOR THE FIRST TIME IN CANADA? ☐ YES ☐ NO

TYPE OF INCOME: ☐ EMPLOYED ☐ SELF EMPLOYED ☐ UNEMPLOYED ☐ RETIRED/PENSION

DO YOU PAY RENT? ☐ YES ☐ NO IF YES, HOW MUCH PER MONTH _____

DO YOU PAY PROPOERTY TAX? ☐ YES ☐ NO IF YES, HOW MUCH PER YEAR _____

PROPERTY OUTSIDE CANADA VALUE MORE THAN CAD$ 100,000: ☐ YES ☐ NO

PROPERTY SOLD LAST YEAR CLAIMING PRINCIPLE RESIDENCE EXEMPTION: ☐ YES ☐ NO

SUPPORTED DOCUMENTS/SLIPS: ☐ T4 ☐ T4A ☐ T4E ☐ T4(OAS) ☐ T4PS ☐ T5 ☐ T5007 ☐ T5008 ☐ T2202A ☐ MED.EXP. ☐ RRSP ☐ DONATION

☐ I AM A CANADIAN CITIZEN ☐ PROVIDE MY INFORMATION TO ELECTION CANADA

Please provide any additional information/slips:

_____

_____

_____

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CONSENT TO USE & DISCLOSURE OF INFORMATION

Ontario Tax Services & Accounting Solutions Inc. ("OTSAS") is dedicated to maintaining high standards of confidentiality with respect to the personal information that we collect from our customers. This is also a consent to the use and disclosure of your personal information in connection with the tax return preparation process and in connection with the provision of any other services or products that you request.

We collect and use your personal information that is required for the preparation and filing of your tax return; including your contact information such as address and email address, your identifying information such as SIN and your tax and financial information. We collect and use information necessary for payment and billing. If you request products or services in addition to tax return preparation, we collect and use your personal information to fulfill these requests. We may also collect and use your personal information to attempt to understand your preferences so that we can offer you products or services. To the extent possible, personal information will be collected directly from you. If you are unable to provide necessary personal information, we may attempt to obtain such information from a financial institution, government agency or other third-party source. Collection of information is limited to that information required to perform the services that you request, comply with regulatory requirements, market products and services and manage business operations.

We do not disclose your personal information to third parties, except as necessary to perform the services that you request, to comply with regulatory requirements and to manage business functions.

We would like to contact you electronically, including via email, regarding your tax return, tax filing information, tax updates, appointment setting, customer service matters, service and product opportunities and other promotional matters. You can ask us to stop electronic communications anytime.

By signing below, you consent to receiving the types of electronic communications listed above from OTSAS. Also, by signing this below, you acknowledge that you have reviewed and agree with the terms of the OTSAS and you consent to the collection, use and disclosure of your personal information for the purposes and in the manner described above in this Consent.

☐ **EMAIL CONSENT**
(We will never share your email address & you can opt out any time.)

_____
CUSTOMER SIGNATURE
(By signing above, I certify all information is true and correct to the best of my knowledge.)

_____
DATE

SAVE AND SUBMIT THIS FILE TO: TAX@OTSAS.CA

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