

2011 Personal Tax New Client Information Checklist
Masuda Munro Chartered Accountants
Phone: 464 - 3933 Fax: 467 - 4957

Date Received: _____ By: _____ Partner In Charge _____

Client Name: _____

Social Insurance Number: _____ Date of Birth: _____

Email: _____ **Phone Numbers:**

Address: _____ Home: (_____) _____

_____ Work: (_____) _____

Postal Code: _____ Cell: (_____) _____

Province of residence on December 31 _____

Marital Status on Dec. 31:

Married Divorced Common-law Separated Widowed Single

Did marital status change in tax year? Yes No When? _____

Spouse's Name: _____

Social Insurance Number: _____ Date of Birth: _____

Is spouse also filing a return with us? Yes No

If no, Spouse's Net Income \$ _____

Dependants

Name	Date of Birth	Gender
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2010 Notice of Assessment enclosed? Yes No

2010 Personal Tax Return enclosed? Yes No

Please fill in and sign an Engagement Letter.