

CLIENT FORM

You acknowledge that by sending this form to the secure S2 Global Consulting email address, you have agreed to the following:

- 1. If your case is simple, there is no need to schedule an appointment. We will process it and send a return to you. We will call you if we have questions.**
2. Please submit the completed Client Form along with all the documents (e.g. T4) via an [online-form](#) at least 24 hours before the scheduled appointment (if you have one).
3. During the phone call or virtual session (if needed), S2 Global Consulting may ask for the documents confirming your identity, status in Canada, and information reported in the income tax return. Please note that in simple cases, the tax return can be filed without a session. The filed tax return will be sent to your email address.
4. It is your responsibility to truthfully disclose all actual information about your identity, family, marital status, sources of income that may be subject to taxes in Canada, and eligible expenses.
5. S2 Global Consulting will provide consultation according to the disclosed information and within the Canadian legislature.
6. S2 Global Consulting will secure and protect the digital copy of you your income tax return unless you opt out.

Personal information in this form must be identical to the information on your government-issued documents.

CLIENT INFORMATION	
First name	
Last name	
Social Insurance Number (SIN)	
Province of residence on Dec 31, 2024	
Date of birth	
Marital Status	
Address (apt, street, city, postal code)	
Phone number	
Email address	

ARE YOU SUBMITTING THIS TAX RETURN WITH YOUR SPOUSE?	
If NOT , please, provide the following information	If YES , please, complete a separate questionnaire for your spouse
Spouse name	
Spouse date of birth	

Spouse income in 2024	
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IMMIGRATION	
Date of your arrival in Canada	
In-year income received before your arrival in Canada.	

RENT AND UTILITIES	
Landlord's name	
Number of months you have been renting in 2024	
Total rent amount paid in 2024	
<i>If you are a resident of Ontario:</i> <ul style="list-style-type: none"> - Utility paid for hydro - Utility paid for natural gas 	

PROPERTY TAX INFORMATION (FOR HOMEOWNERS IN CANADA)	
Amount of property taxes paid last year	
Amount of school taxes paid last year	
Amount of credit received last year	

MEDICAL EXPENSES	
Medical expenses (date, type of medical expenses, and paid amount)	

INCOME	
<i>Разова федеральна допомога не вказується у податковій декларації. Виплати федерального уряду GST/HST credits, Canada Carbon Rebate, CCB не вказуються у податковій декларації</i>	
<i>Пенсія, соціальні виплати, отримані в Україні, не оподатковуються та не вказуються у податковій декларації згідно договору між Канадою та Україною</i>	
Have you received any social assistance from the province?	If YES, please, provide form T5007
Add your T4, T4A, T5018, T5007 and other forms	Attach forms/documents
Information about any other income subject to taxation in Canada.	

SELF-EMPLOYED INCOME	
Please provide details on your self-employment.	

BUSINESS EXPENSES БІЗНЕС-ВИТРАТИ	
Provide details on eligible business expenses or attach a list of transactions (please add type of expenses)	

DEPENDANT INFORMATION (CHILDREN UNDER 18 OR INFIRM ADULTS RELATED BY BLOOD OR MARRIAGE)				
First Name	Last Name	Date of Birth DD-MM-YYYY	Relationship	Net income in 2024

CHILDCARE EXPENSES			
Category	Details	Child (first and last name)	Amount
Childcare			
Camps			
Fitness, sports			
Art			

OTHER INFORMATION

NEXT STEPS:

1. **Save this document in Word or PDF format. We do not accept other formats.**
2. If you want to submit your spouse income tax return, please, complete the same document and save it under another name.
3. **If your case is simple, there is no need to schedule an appointment. We will process it and send a return to you. We will call you if we have questions.**
4. Submit the completed form(s) for each adult/partner/spouse via [this online-form](#) to **no later than 1 day** before your appointment if you have one. Tax Pro Canada uses secured SSL protocols and encryption to protect your documents.
5. Submit other documents, for instance, T4, T4A, T5018 or other documents confirming your income and/or expenses. Take photos or scan your documents and submit them along with this document via this [online-form](#) (recommended) or share them using your personal cloud storage, such as One drive, Google drive etc.
6. Be ready to demonstrate your government-issued ID confirming your identity and personal information.
7. Be ready to provide your government-issued ID, statements, and receipts confirming your income and expenses.

Thank you for your business

S2 GLOBAL CONSULTING

Office Address:

Unit 601-4656 Westwinds Drive NE

Calgary Alberta Canada

Contact No: 403 647 4343, 587 897 2737

s2globalconsultinginc@gmail.com

www.s2globalconsulting.ca

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