



2025 Personal Intake Form

As the tax deadline of April 30th approaches, we are providing you with this intake form to assist in collecting the necessary information required for us to complete your personal tax return. Please review and complete all relevant fields and email your completed form to info@ytaxservices.com. If you have any questions, please do not hesitate to contact us.

PERSONAL SECTION

SPOUSE SECTION

If you are a returning client with no changes made this year to your addresses, spouse, or dependents, please check this box.

Full Legal Name	
Address	
City	Province
Postal Code	Phone Number
Date of Birth (dd/mm/yyyy)	Social Insurance Number
Email	

Canadian Citizen? If answer yes, please check the box.

Full Legal Name	
Address	
City	Province
Postal Code	Phone Number
Date of Birth (dd/mm/yyyy)	Social Insurance Number
Email	

Canadian Citizen? If answer yes, please check the box.

Marital Status: Married Single Common-Law Divorced Widowed

If marital status changed during this tax year, provide date of change (dd/mm/yy): _____

DEPENDENTS

Full Legal Name	Social Insurance Number	Date of Birth (dd/mm/yyyy)

2025 Personal Intake Form



Please complete the form below in full before returning. **Provide all necessary tax slips / tax receipts / documentation** when submitting this intake form.

TAX RETURN

Do you want your Notice of Assessment electronically	Yes	No
Did you contribute to an RRSP?	Yes	No
Did you make any charitable donations?	Yes	No
Do you have any childcare expenses?	Yes	No
Do you have any medical expenses not covered by benefits?	Yes	No
Did you pay interest on a student loan?	Yes	No
Did you work from home in the tax year?	Yes	No
Do you have a disability tax certificate?	Yes	No
Did you pay rent this year?	Yes	No

If yes, complete the blanks below

Landlord Full Name	Total Rent Amount \$
--------------------	----------------------

Are you a first-time home buyer?	Yes	No
----------------------------------	-----	----

If yes, complete the blanks below

Full Legal Address	
Date of Purchase (dd/mm/yyyy)	Purchase Price \$

2025 Personal Intake Form



Y&Y Tax Services

Did you sell your principal residence?

Yes

No

If selected *yes*, complete the blanks below

Full Legal Address	
Date of Sale (dd/mm/yyyy)	Sale Price \$
Date of Purchase (dd/mm/yyyy)	Purchase Price \$

Did you sell a property that is **not** your principal residence?

Yes

No

Did you own foreign property at any time during the tax year with a total cost of more than \$100,000?

Yes

No

Do you have rental income?

Yes

No

If selected *yes*, is it commercial or residential?

Total rental income amount for the year.

\$

Do you consent to sending your information to Elections Canada?

Yes

No

How did you hear about us?

Internet Search

Social Media

Bill Board

Family/Friend

Other

If selected *Other* please specify:

Thank you for taking the time to complete this intake form. **Please provide all necessary tax slips / tax receipts / documentation** and send your completed intake form to info@ytaxservices.com

2025 Personal Intake Form



DEPENDENTS

**Add dependents below if section on *page 1* is full. **

Full Legal Name	Social Insurance Number	Date of Birth (dd/mm/yyyy)

RESOURCES