

GPA LLP

Amount:

T1 Control Sheet for 2024 Taxation Year

Amount:

Drop off date: _____

New Client: ☐ Yes or ☐ No

Pick up: ☐ Edmonton ☐ Sherwood Park ☐ Portal Corporate Client: ☐ Yes or ☐ No

PERSONAL INFORMATION:

Client Name: _____ Spouse Name: _____

Client SIN: _____ Spouse SIN: _____

Client D.O.B.: (year/mm/dd) _____ Spouse D.O.B. : (year/mm/dd) _____

Address: _____

City: _____ Prov: _____ Postal Code: _____

Client Phone: _____ ☐ H or ☐ C Spouse Phone: _____ ☐ H or ☐ C

Client Email: _____ Spouse Email: _____

Marital Status on December 31: ☐ Single ☐ Married ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed

If Marital Status or Name changed, give date &/or name change: _____

Date of Death: _____ Copy of Will: ☐ Y or ☐ N Copy of Death Certificate: ☐ Y or ☐ N

Canadian Citizen: ☐ Y or ☐ N US Citizen: ☐ Y or ☐ N Entry/Exit date: (year/mm/dd) _____

Elections Canada: Do you authorize the CRA to provide your name, address, and date of birth to Elections Canada to update your information on the National Register of Electors? ☐ Y or ☐ N

Do you own any **Foreign Property** with a total cost greater than \$100,000? ☐ Y or ☐ N Complete T1135: ☐ Y or ☐ N

Did you own a **vacation property** with more than **1 person on title** as of Dec 31, 2024? Complete UHT 2900: ☐ Y or ☐ N

DEPENDANTS: *Additional dependants please write on back on form.*

Name	Relationship	DOB (year/mm/dd)	S.I.N.	Income

Disability Tax Credit on file with CRA for anyone? _____ Infirm Dependants? _____

Tuition Transfer from dependant? _____ Student loan interest? _____ Childcare? _____

Medical receipts? _____ Charitable Donation receipts? _____

First Time Home Buyer? _____ Did you open a FHSA in 2024? _____

Digital News Subscription? _____ Capital Gains/Loss Summary? _____ Investment Fees? _____

Did you receive a pension from a country other than Canada? ☐ Y or ☐ N Which Country _____

Do you have **Direct Deposit** set up? ☐ Y or ☐ N Uncashed Cheques? Y ☐ or ☐ N

Did you **sell your Principal Residence**? ☐ Y or ☐ N Year Purchased: _____ Sale Price: _____

Full Address: _____