



Drop Off Sheet

Date: _____

Prior Client New Client*

*new clients must sign & attach authorization form

Interested in **CIS Fast Cash Refund®**? Yes No

Taxpayer Information

First Name: _____ Last Name: _____

SIN: _____ Date of Birth (dd/mm/yyyy): _____

Phone Number: _____ E-Mail: _____

Address: _____ City: _____ Postal Code: _____

Canadian Citizen? Yes No Province: _____

American Citizen? Yes No

Marital Status on December 31 of last year (please circle):

Married Single Common Law Widowed Separated Divorced Date of Change: _____

Spouse/Common-Law Partner Information (if applicable)

First Name: _____ Last Name: _____

SIN: _____ Date of Birth (dd/mm/yyyy): _____

Canadian Citizen? Yes No Net Income (if filing separately): _____

American Citizen? Yes No

Dependents Information (if applicable)

1. First Name: _____ Last Name: _____ SIN: _____

D.O.B: _____ Relationship: _____ Net Income: _____ Post-Secondary Student: Yes No
Disabled (T2201 on file): Yes No

2. First Name: _____ Last Name: _____ SIN: _____

D.O.B: _____ Relationship: _____ Net Income: _____ Post-Secondary Student: Yes No
Disabled (T2201 on file): Yes No

3. First Name: _____ Last Name: _____ SIN: _____

D.O.B: _____ Relationship: _____ Net Income: _____ Post-Secondary Student: Yes No
Disabled (T2201 on file): Yes No

*Add additional dependents on next sheet

Other Information

Paid Rent Paid Property Taxes N/A

Amount Paid in 2020: _____ Landlord Name (if applicable): _____

Address (if different than address provided above): _____

- Were you physically present in the US at least 183 days last year? Yes No
- Did you sell any property last year? Yes No
- Do you own any foreign property over \$100,000 CAD? Yes No
- Are you self-employed or did you own your own business? Yes No
- Do you have an incorporated business? Yes No
- Did you work outside of Canada or have foreign income? Yes No
- Were you enrolled in a Post-Secondary school last year? (attach T2201) Yes No
- Do you own any rental properties? Yes No
- Do you need to complete an Estate return? Yes No
- Did you work from home in 2020 due to COVID-19? Yes No
- Did you receive any government related assistance such as CERB? Yes No
- Did you recently move to Canada? (if yes, complete next section) Yes No

First Time Filing in Canada

Date you entered Canada (dd/mm/yyyy): _____ From (country): _____

Income prior to entering Canada (in CAD) 2020: _____ 2019: _____ 2018: _____

Additional Information
