

PERSONAL TAX INTAKE

FORM GA-01 · COMPLETE ONE PER TAXPAYER

TAX YEAR THIS FORM COVERS

DATE COMPLETED

01 YOUR INFORMATION

FULL LEGAL NAME

SOCIAL INSURANCE NUMBER

DATE OF BIRTH

STREET ADDRESS

UNIT / APT

CITY

PROVINCE

POSTAL CODE

PHONE

EMAIL

MARITAL STATUS ON DECEMBER 31

Single

Married

Common-law

Separated

Divorced

Widowed

IF YOUR STATUS CHANGED DURING THE YEAR — DATE OF CHANGE

New client

Returning client

02 SPOUSE OR PARTNER

Skip if single — the CRA still needs their income if you have one

FULL LEGAL NAME

SOCIAL INSURANCE NUMBER

DATE OF BIRTH

Prepare our returns together — recommended; credits are optimized as a household

IF FILING SEPARATELY — SPOUSE'S NET INCOME

03 DEPENDANTS

Children or other dependants — needed for credits and benefits

FULL NAME

RELATIONSHIP

DATE OF BIRTH

SIN (IF ANY)

PERSONAL TAX INTAKE

FORM GA-01 · INCOME & DEDUCTIONS

04 INCOME THIS YEAR

Check everything that applies — we'll confirm the slips

Employment (T4)

Pension, scholarship, or contract work (T4A)

Interest or dividends (T5)

Sold stocks or securities (T5008)

Self-employment or gig income

Sold property or investments (capital gains)

Foreign income or pensions

WSIB or social assistance (T5007)

Employment insurance (T4E)

OAS / CPP benefits (T4A-OAS, T4A-P)

Trust or mutual fund income (T3)

RRSP / RRIF withdrawals (T4RSP, T4RIF)

Rental income

Crypto or digital assets — also complete Form GA-02

Spousal or child support received

Other _____

05 DEDUCTIONS & CREDITS

Check what you paid for — receipts make them count

RRSP contributions

Childcare expenses

Charitable donations

Student loan interest

Employment expenses (T2200 from employer)

Spousal or child support paid

Rent or property tax paid (Ontario Trillium Benefit)

Other _____

FHSA contributions

Medical or dental expenses

Tuition (T2202)

Union or professional dues

Home office

Disability tax credit (approved or applying)

Moving expenses (40+ km closer to work or school)

Not sure whether something counts? Check it anyway or note it on page 3 — deciding what applies is our job, not yours. It's faster to rule something out than to discover it in March.

06 QUESTIONS THE CRA ASKS

THESE AFFECT REQUIRED FORMS AND ELECTIONS – ANSWER FOR THE TAX YEAR ABOVE	YES	NO
Did you own foreign property with a total cost over \$100,000 CAD at any time? (includes crypto on foreign platforms – triggers Form T1135)		
Did you sell a home that was your principal residence?		
Did you buy your first home?		
Are you a Canadian citizen, and do you authorize the CRA to share your name with Elections Canada?		
Are you registered for CRA My Account?		
Is direct deposit set up with the CRA?		

07 ANYTHING ELSE WE SHOULD KNOW

Life changes, CRA letters, things you're unsure about

08 CONSENT & SIGNATURE

The information on this form is true, correct, and complete to the best of my knowledge. I authorize Greywood Advisory to prepare my personal income tax return from the information and documents I provide, and to file it electronically with the Canada Revenue Agency once I have approved it. I understand that my information is collected and used only to prepare and file my return, is stored encrypted, is seen only by the person preparing my return, and is retained in line with CRA record-keeping requirements – six years. The CRA's electronic filing authorization (Form T183) is signed separately for each return.

SIGNATURE

DATE

PRINTED NAME