



P & D ACCOUNTING SERVICES LTD
SINCE 1998

1086 Northmount Drive NW
Calgary, Alberta
T2L 0C2
403.284.1495

www.pdaccounting.com

CLIENT INFORMATION:

Name: _____

SIN: _____

Date of Birth: _____

Phone: _____

Email Address: _____

Address: _____

CLIENT INFORMATION:

Name: _____

SIN: _____

Date of Birth: _____

Phone: _____

Email Address: _____

Address: _____

MARITAL STATUS

Single

Married

Living Common Law

Divorced

Separated

Widowed

DEPENDANTS:

** If you have shared custody, please provide details/ arrangements for claiming purposes*

Name: _____

Name: _____

Date of Birth: _____

Date of Birth: _____

What is your preferred method of communication:

Email

Phone

How would you like to receive your completed return

PDF

Paper

Both

Do you have access to your CRA MyAccount?

Yes

No

Have you added P&D Accounting Services as a Level 2 online representative

Yes

No

To add us as a representative:

1. Log into your CRA MyAccount
2. On the left side, click Profile
3. On the right side, scroll down to Authorized representative(s)
4. Click + Add
 - a. Start
 - b. Enter **870245248** and search– P&D Accounting Services Ltd should show up
 - c. Allow us Level 2 and Online Access
 - d. Submit

