

Name: _____ DOB: _____ SIN: _____

Mailing Address: (changes from last year only) _____

Postal code: _____ Phone: _____ Email: _____

Martial status: Single Married Divorced Common law

Dependants: (Changes from last year only). _____

Filing their own T1's

Name: _____ Birthdate: _____ Yes No

Name: _____ Birthdate: _____ Yes No

Name: _____ Birthdate: _____ Yes No

WE INTEND TO E-FILE YOUR TAX RETURN AND MAIL YOU A SUMMARY OF THE DETAILS. IF YOU REQUIRE ANY FURTHER INFORMATION FEEL FREE TO CONTACT US. ALSO ADD ADDITIONAL SHEETS IF REQUIRED.

Information slips for the following income:

- Employment (T4)
- Employment insurance (T4E)
- Workers' compensation (T5007)
- Interest, Dividend and Mutual Funds (T3, T5, T5008)
- Old Age Security / CPP (T4A-OAS, T4A-P)
- Pension, annuity income (T4A)
- RRSP , RIF (T4RSP, T4RIF)
- RL-1 Employment and others
- Social assistance received (T5007)

Receipts for the following deductions:

- Accounting fees / Legal fees
- Charitable / Political donations
- Child care expenses (including names, Addresses and S.I.N. of recipient)
- Tuition transfer signed by spouse / children (T2202)
- Teaching supplies for classroom
- Education deduction / Student loan interest
- Tax exempt scholarships
- Exams for professional certification
- Interest paid
- Investment counselor fees
- Medical Expenses
- Moving expenses
- RRSP contributions
- RRSP home ownership details/Home buyers amount
- Union / professional dues
- Tools expense
- Spouse support / Child support paid or received
- Disability tax credit (self / dependents)
- Attendant care / care in a facility
- Northern residents deductions
- Home accessibility expenses
- Digital NEWS subscription

Documents for the following transactions:

- Commodities transactions
- Sale or deemed sale of real estate, stocks, bonds
- RRSP deduction limit and unused amounts
- Tax shelters
- Last year's tax return
- CRA's Notice of Assessment for last Year's return
- Stocks / Mutual fund sales
- Signed T183 / T1013
- T2200 Employment conditions (signed by employer)
- CRA Installment Payments Total paid
- Other CRA correspondance

Other details:

- Alimony / maintenance paid or received**
- Automobile expenses if eligible
- Taxable benefits not on T4
- Foreign assets over \$100,000.00
- Principal residence sale
- Dependent's Net income
- Rental income & expenses***
- Self-employment income / expenses*
- Spouse's income (if we are not preparing)
- Farming or Fishing income
- Capital gains / Losses
- Adoption expenses
- Tution carry forward amounts
- Loss carry forward amounts
- Other carry forward amounts
- Dependents not listed on your prior years Return

Name _____

Birthdate _____

Citizenship: Canadian U.S. Other (please specify) _____

*Self-employed expenses include: Advertising, Business License(s), Bank Charges, Office Supplies, Legal and accounting fees, Telephone, Meals and entertainment, Travel, Rent, Repairs, Equipment Leased, Automobile expenses, Utilities, Property Taxes, Insurance, Square footage of home office/total square footage of residence, Business Loan Interest(s).

** Provide name and address of sender/recipient. ***Income, Mortgage interest, Property tax, Insurance, utility and other expenses.

COMMENTS: _____

CALL US

if you don't
have phone
App account

