

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 correspondence

#### 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
- ☐ Tutition 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

