

Name: _____
Mailing Address: _____ (Changes from last year only)

Postal Code: _____

Phone: H _____ W _____

Marital Status: Single Married Divorced Common law

Cellular phone: _____

Email Address: _____

Dependants: (changes from last year only)

Filing their own T1's

Name: _____ Birthdate: _____ Yes No

Name: _____ Birthdate: _____ Yes No

Name: _____ Birthdate: _____ Yes No

(if additional space is required, please add an additional sheet)

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:

Information slips for the following income:

Dividend (T5)
Employment (T4)
Estates/Trust/Mutual Funds (T3)
Interest (T5)
Pension (T4A)
RSP, DPSP, RPP, RRIF, (T4RSP)
T4A(OAS), T4A(P)
EI (T4E)
Other _____

Documents for the following transactions:

Commodities transactions
Real estate sales or purchases
RRSP/ Home Buyers Plan
Tax shelters
CRA's Notice of Assessment for last Year's return
Stocks / Mutual fund sales
Signed T183 / T1013
T2200 Conditions of employment
Other _____

Receipts for the following deductions:

Accounting fees/Legal fees
Charitable / Political donations
Child care expenses (including names, Addresses and S.I.N. of recipient)
Education deduction
Interest paid
Investment counselor fees
Medical Expenses
Moving expenses
RRSP contributions
RRSP home ownership details
Tuition fees (T2202, signed by student)
Union / professional dues

Other Details:

Alimony / maintenance paid or received**
Automobile expenses if eligible
Taxable benefits not on T4
Foreign assets over \$100,000.00
Principal residence disposed
Dependent's income
Dependents not listed on your prior years Return – Name _____
- Birth Date _____
Rental income & expenses
Self-employment income / expenses*
Spouse's income (if we are not preparing)
Farming or Fishing income
Capital gains / Losses

Other _____

Other Items:

Assessment Notices received in the year
Adoption Credit
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.

COMMENTS:

