

Please complete the following and return to our office to help us better serve you and maximize your tax savings!

Contact Info: (Update for any changes)

Name _____

Birthdate _____

S.I.N. _____

Spouse's Name _____

Birthdate _____

S.I.N. _____

Marital Status _____

Date of marriage (if current year) _____

Address _____

Home Phone _____

Work Phone _____

Cell Phone _____

Email _____

Details of Dependants

Name	DOB	Income
_____	_____	_____
_____	_____	_____
_____	_____	_____

Slips

- Employment or commission income (T4, T4PS)
- Statement of Pension, Retirement, Annuity, and other income (T4A, T4RIF)
- Universal Child Care Benefit statement (RC62)
- Old Age Security (T4A(OAS))
- Canada Pension Plan (T4A(P))
- Employment Insurance (T4E)
- Dividend or interest income (T5, T3)
- Partnership income (T5013)
- RRSP income (T4RSP)
- WCB or Social Assistance (T5007)
- Government service contract payment (T1204)

Other Income

- Rental income and expenses
- Sale of property or investments
- Details of sale of principal residence
- Support payments
- Business income and expenses
- Farming income and expenses (including cattle & crop sale tickets and cattle & feed purchase tickets)
- Scholarships or bursaries
- Income from outside of Canada

Deductions

- RRSP contributions
- Union or professional dues
- Child care expenses
- Moving expenses
- Support payments
- Employment expenses (w/ T2200)
- Carrying charges or interest expense to earn business or investment income

Credits

- Public transit receipts
- Children's fitness, artistic, cultural and recreational expenses
- Volunteer firefighter or Search & Rescue details
- Adoption expenses
- Interest paid on student loans
- Tuition and education amounts (T2202, TL11A) and exam fees
- Medical expenses (including details of insurance reimbursements)
- Donation or political contributions

Other Information

- Previous year's Notices of (Re)Assessment
- Tax instalments made
- Changes in family circumstances (marriage, births, deaths, marriage breakdown, disabilities, relocation)
- Are you a first time home buyer?
- Do you or a dependant have a mental or physical disability?
- Details of foreign property or investments held with a cost greater than \$100,000
- Direct Deposit Setup – please include a void cheque



CHARTERED ACCOUNTANTS LLP