

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 Dependents**

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

**Slips**

- Employment or commission income (T4, T4PS)
- Statement of Pension, Retirement, Annuity, and other income (T4A, T4RIF)
- 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 including accommodation sharing (ie. VRBO, Airbnb)
- 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
- Volunteer firefighter or Search & Rescue details
- Adoption expenses
- Interest paid on student loans
- Tuition and exam fees (T2202, TL11A)
- Medical expenses (including details of insurance reimbursements)
- Donation or political contributions

**Other Information**

- Previous years 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 dependent 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 PROFESSIONAL ACCOUNTANTS  
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