

	YOU	SPOUSE
Name:		
Date of birth:		
Social Insurance #:		
Complete Address:		
Email Addresses:		
Phone #s home:		
work:		
cell:		

Marital status: married ___ common law ___ separated ___
single ___ divorced ___ widowed ___

Any change to marital status? _____ Date of change: _____

Dependents:

Name:	Relationship	Date of Birth	S.I.N.	Disabled?	Income

Did taxpayer become deceased during year? _____ Date of Death: _____

Did taxpayer immigrate to or emigrate from Canada during year? _____

Date of entry _____ Date of departure _____

Are you a Canadian Citizen? _____

Do you authorize Canada Revenue Agency to release your name, address & birth date to Elections Canada for purposes of updating the National Register of Electors? _____

Do you hold investments or real property outside of Canada which originally cost in excess of \$100,000 Cdn? _____

INCOME INFORMATION

Income slips:

- _____ T4 Employment Income
- _____ T4A's Pension, Retirement, Annuity, Old Age Security or Other
- _____ T4RSP Registered retirement savings plan
- _____ T4RIF Registered retirement income fund
- _____ T4E Employment Insurance benefits
- _____ T5 Investment Income
- _____ T5007 Workers compensation or social assistance
- _____ T5008 Securities transactions
- _____ T5013 Partnership income
- _____ T3 Trust income
- _____ RC62 Universal child care benefit

INVESTMENT INFORMATION

- _____ Annual mutual fund statements for all funds held outside your RRSP or RRIF
- _____ Details of all investment disposals during tax year including information to support original purchase price + cost adjustments
- _____ Details of investments that were subject to 1994 capital gains election, if any

RENTAL INCOME _____ Full address, number of units
 _____ Date acquired, purchase price
 _____ Revenue & expenses, including mortgage interest, insurance, property taxes etc.
 _____ Percent of personal usage
 _____ If property was bought or sold during tax year, provide purchase/sale agreement,
 statement of adjustments from lawyer & price allocation of value between land,
 building & furniture etc.

SELF EMPLOYMENT INCOME _____ Income & Expense details net of GST if registered
 _____ GST returns if registered
 _____ Inventory at year end of goods purchased and available for sale
 _____ Details of capital assets disposed of during tax year, vehicles, equip. or computers
 _____ Farmers include inventory of livestock, grain, forage numbers, cost + values.
 _____ Agristability supplemental forms.

EXPENSES ~ Self employment, Employment or Commission

_____ T2200 Statement of allowable expenses signed by employer
_____ Meals & entertainment
_____ Travel, promotion, conferences, dues, telecommunications, supplies, etc.
_____ Vehicle - vehicle mileage log w/total klms & total business klms + operating
 expenses, lease costs, loan interest, purchase/sale price if bought/sold during tax
_____ Office in home - total square footage of home & square footage of office used for
 business use. Mortgage interest, rent, property taxes, condo fees, utilities, insurance,
 general repairs & maintenance, etc.
_____ Details of capital assets purchases in year eg. Vehicles, equipment, computers, etc.

DEDUCTIONS

_____ RRSP receipts
_____ Child care w/supporting receipts & SIN of caregiver
_____ Adoption costs
_____ Safety deposit box rental if for investment or business reasons
_____ Union/membership dues
_____ Moving expenses
_____ Alimony & support payments w/copy of agreement
_____ Accounting fees for investment or business income, investment counsel fees
_____ Legal fees to collect salary, alimony, support
_____ Investment/business interest expense
_____ Tax shelter deductions - tax slips & tax reporting package
_____ Tradespeople's tools

TAX CREDITS

_____ Charitable & political donation receipts
_____ Medical/dental/attendant care expenses w/receipts
_____ Tuition fee receipts, w/dependents income & signatures (T2202)
_____ Disability credit form (T2201) for self or dependent for 1st time claims
_____ Student loan interest statement
_____ Child fitness receipts for children under age 16 (maximum of \$500 per child)
_____ Receipts for monthly transit passes
_____ Home renovation tax credit receipts
_____ Eligibility for 1st time home buyers credit (home purchased after January 27, 2009)

MISCELLANEOUS

_____ Notice of assessments/reassessments for prior years taxes
_____ Tax installment summary or payments information
_____ New client , copies of 2 years prior returns, notices of assessments, carry forward
 details on donations, losses, RRSP contributions, etc.