

Welcome!

To ensure we have the information we need to best serve you, please take a few moments to fill out the form below and return to us together with the financial information assembled. If you have any questions, please feel free to contact us at any time. Thank you!

Client Information

Last Name

First Name

SIN

Date of Birth

Address

City

Prov

Postal Code

Country

Telephone

Mobile

Email

Same address at last year?

Yes No

Date if marital status changed

If we are not preparing tax return for your spouse, please provide below:

Marital Status:

Single

Married

Common Law

Separated

Divorced

Widowed

UCCB from
T1 Line 11700

Net Income from
T1 Line 23600

Dependents

Check if Disability Tax Credit (DTC) Certificate received on qualified spouse or infirm dependant and provide to us.

Name	Birthday	Relation	SIN	Net Income	Infirm?
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Are you a Canadian citizen?	Yes	No		
If Canadian, authorize CRA to provide information to Elections Canada?			Yes	No
Did you own foreign property at any time in the year with cost more than \$100,000?			Yes	No
Do you have a Business or Professional Income?	Did you sell a home in the last year?		Do you have Rental Property?	
Yes (complete the Business Form)	Yes (complete Sale of Real Estate form)		Yes (complete Rental Property form)	
No	No		No	
Do you want tax refund to be deposited to your bank account?				
Yes (provide void cheque)	Direct Deposit on file		No	

CHECKLIST: Please provide applicable slips

SOURCES OF INCOME:

T3	T4	T4A
T4A(P)	T4A(OAS)	T4A-RCA
T4E	T4PS	T4RIF
T4RSP	T5	T5007
T5008	T5013	RC62
RC210	Self Employment Income	Rental Income
Foreign Income	Proceeds from Investment Sale	Proceeds from Real Estate Sale
Spousal Support Received	Child Support Received	Tips and Gratuities

DEDUCTIONS & TAX CREDITS

RRSP Contribution Receipts	Child Care Expense Receipts
Union Dues and Professional Fees	T2202 - Tuition Fee Certificate
Charitable Donations	Medical Expenses
Moving Expenses	Public Transit Passes (for Seniors only)
Interest Paid on Investment Loans	Investment Counseling Fees
Interest Paid on Student Loans	Political Contributions
First Time Homebuyers (FTHB) Amount	FTHB Plan Withdrawals/Repayments
Lifelong Learning Plan Withdrawals/Repayments	Tax Installments Paid to CRA
Employment Expenses	Spousal Support Payments
Child Support Payments	Other Expenses

OTHERS

Prior year Notice of Assessment (NOA)
 Disability Tax Credit (DTC) certificate (if applicable)