

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:

