

DATE RECEIVED _____

PICK UP DATE _____

T1 Personal Tax Return Year



**Gregory Badley CPA
Professional Corporation**

Please complete this checklist and return it to us together with your financial information

Number of tax returns to be prepared: _____

Personal Information	Spouse Information (If Applicable)
Name:	Name:
SIN Number:	SIN Number:
Date of Birth: (MM/DD/YY)	Date of Birth: (MM/DD/YY)
Phone #:	Phone #:
E-mail:	E-mail:
Address:	Address:
City	City
Province/State: Postal Code:	Province/State: Postal Code:
Did you during the year: <small>Emigrate from Canada</small> <small>Immigrate to Canada</small> <i>Emigration date:</i> <i>Immigration date:</i>	Did you: <small>Emigrate from Canada</small> <small>Immigrate to Canada</small> <i>Emigration date:</i> <i>Immigration date:</i>

Marital Status: (Please circle) Single Married Common-Law Separated Divorced Widowed
Did your marital status change from last year's tax return? <input type="radio"/> Yes/No <i>Date status changed:</i>
Are we preparing a tax return for your spouse? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
If we are NOT preparing a tax return for your spouse, please provide: <i>Income figure from Line 23600 on page 4</i> \$ _____

Please list all dependants below:

Name	Relationship	Birthday (MM/DD/YY)	SIN#	Net Income During Year
1 _____				
2 _____				
3 _____				
4 _____				

Other Matters

1 Do you, your spouse or any of your dependants qualify for the Disability Tax Credit?	Yes	No
<i>If yes, please indicate whom:</i> _____		
2 Are you a Canadian citizen?	Yes	No
3 Do you authorize the CRA to provide information about you to Elections Canada?	Yes	No
4 Do you own/hold foreign property (including shares) with a total cost of more than \$100,000 (CAD)?	Yes	No
5 Have you made installment payments for the tax year? <i>If yes, how much</i> \$ _____	Yes	No
6 Did you sell your principal residence? <i>If yes, what year?</i> _____	Yes	No
7 Are we preparing a tax return for a deceased person?	Yes	No
<i>If yes, date of death</i> _____; Copy of death certificate and will required		
8 Are you claiming work from home expenses?	Yes	No
<i>If yes, will you be using the simple method?:</i> <i>No of days</i> _____	Yes	No
<i>If claiming the detailed method please provide list of expenses</i>		
9 Did you pay property tax? Property tax paid \$ _____	Yes	No
10 Did you rent? Rent pd:\$ _____ Name of landlord: _____	Yes	No
11 Do you have a rental property, sold your 2nd property or have self employed income?	Yes	No
12 How do you want your tax return delivered once it has been completed by us? (Please check one)		
<input type="checkbox"/> Electronic copy sent to your email Email address to use: _____		
<input type="checkbox"/> Hold for pick-up	<input type="checkbox"/> Courier to your home address. (extra charges will apply)	

Please bring your 2020 Notice of assessment

Please complete at back any additional notes or information that are relevant to completing your tax return