

DATE RECEIVED _____

PICK UP DATE _____

T1 Personal Tax Return Year



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> <input type="checkbox"/> <small>Immigrate to Canada</small> <input type="checkbox"/>		Did you: <small>Emigrate from Canada</small> <input type="checkbox"/> <small>Immigrate to Canada</small> <input type="checkbox"/>	
Emigration date: _____		Emigration date: _____	
Immigration date: _____		Immigration date: _____	

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 <u>NOT</u> 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
If yes, please indicate whom: _____
- 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? *If yes, how much \$* _____ Yes No
- 6 Did you sell your principal residence? *If yes, what year?* _____ Yes No
- 7 Are we preparing a tax return for a deceased person? Yes No
If yes, date of death _____; **Copy of death certificate and will required**
- 8 Are you claiming work from home expenses? Yes No
If yes, will you be using the simple method?: *No of days* _____ Yes No
If claiming the detailed method please provide list of expenses
- 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 Did you stay at a hotel, cottage or campground in 2022? - Ontario Staycation credit Yes No
If yes, need dates, name of the place, HST # and amts paid. *Indiv - Max \$1,000; Family - Max \$2,000.*
- 13 Are you a first-time home buyer? Yes No
If yes, need address of property and acquisition date. Max \$10,000 x 15% - \$1,500

Please bring your 2021 Notice of assessment

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