

# NEW CLIENT

## 2018 TAX FILING INFORMATION SHEET

	<b>First Name</b>	<b>Last Name</b>	<b>SIN</b>	<b>Date of birth (yyyy/mm/dd)</b>	<b>Contact Number</b>
<b>Taxpayer</b>					
<b>Spouse</b>					
<b>Address</b>					
<b>Marital Status</b>	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Common-law	<input type="checkbox"/> Widowed	<input type="checkbox"/> Divorced <input type="checkbox"/> Separated

If there was any change in your marital status during 2018, provide the date of change (yyyy/mm/dd) \_\_\_\_\_

Was there any change in the number of your dependents during 2018? Yes / No: \_\_\_\_\_

Canadian Citizens? Yes/No \_\_\_\_\_. Do you want to provide information to Elections Canada? Yes/NO \_\_\_\_\_

Whether taxpayer/spouse is self-employed (e.g. real estate agent, mortgage specialist, taxi/uber driver etc)? Yes/No \_\_\_\_\_

Does the taxpayer/spouse own foreign investments / property (cost of which is over CAD \$100,000)? \_\_\_\_\_

Did the taxpayer / spouse sell any (principal or rental) real estate property during 2018? Yes/No \_\_\_\_\_

Did the taxpayer / spouse **immigrate to** Canada or **emigrate from** Canada in **2018**? Yes/No \_\_ Date of entry/exit \_\_\_\_\_

### LIST OF DEPENDENTS (children / parents / other persons with disability – conditions apply)

First and Last name	Date of birth (YYYY/MM/DD)	SIN # (if available)	Relationship to client

### PROPERTY TAXES / RENT PAID

Address	Months	Rent paid	Prop. Tax	Name of Landlord/Municipality

### Checkmark Applicable Items

<p><b><u>INCOME</u></b></p> <p><input type="checkbox"/> T3 Income from trust</p> <p><input type="checkbox"/> T4 Employment Income</p> <p><input type="checkbox"/> T4 Employment Insurance Income</p> <p><input type="checkbox"/> T4A Pension, Retirement, Annuity, and Other Income</p> <p><input type="checkbox"/> T4RSP, T4RIF</p> <p><input type="checkbox"/> T5 Investment income</p> <p><input type="checkbox"/> T5007 Statement of Benefits</p> <p><input type="checkbox"/> T5008 Statement of Securities Transactions</p> <p><input type="checkbox"/> T5018 Statement of Contract Payments</p> <p><input type="checkbox"/> T5013 Statement of Partnership Income</p> <p><input type="checkbox"/> Foreign pensions</p> <p><input type="checkbox"/> Amount of spousal support received</p>	<p><input type="checkbox"/> Self employment income</p> <p><input type="checkbox"/> Rental income and expenses.</p> <p><input type="checkbox"/> Capital gains</p> <p><input type="checkbox"/> Income from foreign assets / sources</p> <p><b><u>DEDUCTIONS</u></b></p> <p><input type="checkbox"/> RRSP contribution slips (March to Dec 2018 and Jan to Feb 2019)</p> <p><input type="checkbox"/> Child care expense receipts</p> <p><input type="checkbox"/> Amount of spousal support paid</p> <p><input type="checkbox"/> Moving expenses</p> <p><input type="checkbox"/> Employment expenses - T2200</p> <p><input type="checkbox"/> TL2 meals &amp; lodging for transportation employees</p>	<p><input type="checkbox"/> Legal fees paid to establish spousal support</p> <p><input type="checkbox"/> Legal fees paid to recover wages from your employer</p> <p><b><u>COMMON CREDITS</u></b></p> <p><input type="checkbox"/> Tuition fee slips (T2202A / TL11)</p> <p><input type="checkbox"/> Medical expense</p> <p><input type="checkbox"/> First time home buyer</p> <p><input type="checkbox"/> Donations</p> <p><input type="checkbox"/> Student loan interest receipts</p> <p><input type="checkbox"/> Disability tax credit - T2201</p> <p><input type="checkbox"/> Home Accessibility Credit</p>
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Client Signature \_\_\_\_\_ Date \_\_\_\_\_