

Check list for NEW clients

The information provided to us is strictly confidential and used only by our office and CRA (where applicable).

PART 1 (Personal Information for family members living in your household)

Personal Information

First Name _____ Last Name _____
Date of Birth _____
SIN# _____
Address _____
City _____ Postal Code: _____
Home Phone _____ Cell Phone: _____
Email address _____
Marital Status _____ (If changed in tax year provide date below)
Date of Status change _____

Spouse

First Name _____ Last Name _____
SIN# _____
Date of Birth _____
Cell Phone _____
Email address _____

Preference for receipt of yearly tax letter:

- Mail
 Email Email address: _____

Dependant children and/or relatives living with you (Provide date if this changed in current tax year)

Name	Relationship	Birthdate	Date of change (If applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Do you have parents over 65 that now live with you? (If so, please provide their name, SIN# and net income) _____

Any changes to you or anyone in your household's health (i.e. unable to walk a city block without difficulty) If yes, please explain _____

Do you or anyone in your household have a disability? If yes, please explain _____

Direct deposit information (Please provide a void cheque)

Other changes (Please specify) _____

PART 2 (Checklist)

This following checklist is generic so all the slips or information listed may or may not be required. This checklist is a guide to assist you in remembering what may apply to your situation.

- T4 Slips for those earning employment. Ensure you receive a T4 from EVERY place worked in the current tax year.
- T4AP slips for Canada Pension
- T4A0AS slip for Old Age Security
- T5 Slips for all financial institutions where you are paid interest
- T3 Slips for any investment companies where you may have mutual funds
- Stock Transactions – All stocks or mutual funds sold regardless of whether they were at a loss. Contact your financial advisor to ensure you have all the information required to prepare your tax return. **See the section titled forms on our website**
- Childcare receipts
- Fitness receipts for children under 16 or infirm children or children 18 and under who are eligible for the disability amount
- Artistic, developmental, recreational and/or cultural receipts for children under 16 or children 18 and under who are eligible for the disability amount
- Tuition receipts for you and/or your dependant children who will be transferring their tuition credits to you.
- Medical and dental receipts
 - Don't forget Travel Medical and Residential Care Fees.
- Rental Income Worksheet. **See the section titled forms on our website.**
- Small Business Worksheet. **See the section titled forms on our website**
- Vehicle Worksheet. **See the section titled forms on our website**