



PERSONAL INFORMATION					
Full Legal Name:				S.I.N.:	
Birthdate (yyyy/mm/dd):		Citizenship:		Marital Status:	
Address (Street name & number, City, Postal Code):					
Home Phone:		Cell Phone:		Email:	
Are you or any of your family members: 1. Physically or mentally impaired? YES <input type="checkbox"/> NO <input type="checkbox"/>					
2. A Northern Resident? YES <input type="checkbox"/> NO <input type="checkbox"/>					
SPOUSE INFORMATION					
Full Legal Name:				S.I.N.:	
Birthdate (yyyy/mm/dd):		Citizenship:		Marital Status:	
Home Phone:		Cell Phone:		Email:	
DEPENDENT INFORMATION (Please attach another page for additional children)					
Is there a shared custody agreement for the dependents: YES <input type="checkbox"/> NO <input type="checkbox"/>					
Full Legal Name:		S.I.N.:		Birthdate (yyyy/mm/dd):	
Citizenship:	Gender:	Attended Post-Secondary Education: YES <input type="checkbox"/> NO <input type="checkbox"/> (if yes, please attached T2202A)			
Full Legal Name:		S.I.N.:		Birthdate (yyyy/mm/dd):	
Citizenship:	Gender:	Attended Post-Secondary Education: YES <input type="checkbox"/> NO <input type="checkbox"/> (if yes, please attached T2202A)			
QUESTIONNAIRE					

- Did your marital status change during the tax year? Date of change: _____ YES ☐ NO ☐
- Are you a citizen of any other Country? Country: _____ YES ☐ NO ☐
- Did you or your spouse change names during the tax year? YES ☐ NO ☐
- Did you or your spouse earn rental or self-employment income during the tax year? YES ☐ NO ☐
- Did you move over 40 km in the tax year for a new job or business? YES ☐ NO ☐
- Did you or your spouse buy or sell a home during the tax year? YES ☐ NO ☐
- Did you or your spouse hold any investments during the tax year? YES ☐ NO ☐
- Did you or your spouse pay employment expenses, not reimbursed by your employer, during the tax year? YES ☐ NO ☐
- Did you or your spouse own an interest in a foreign affiliate during the tax year? YES ☐ NO ☐



CHECKLIST

General Information

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| <input type="checkbox"/> Signed Engagement Letter | <input type="checkbox"/> Eligible dependent's income |
| <input type="checkbox"/> Notice of (re) assessment for prior year | <input type="checkbox"/> Alimony/maintenance paid or received |
| <input type="checkbox"/> Income tax instalments paid | <input type="checkbox"/> Disability certificate (T2201) |
| <input type="checkbox"/> Direct deposit information (blank cheque) | <input type="checkbox"/> Tax shelters |
| <input type="checkbox"/> Spouse's net income | <input type="checkbox"/> Other: |

Employment and Pension Income

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|---|--|
| <input type="checkbox"/> Employment T4 or T4A slips | <input type="checkbox"/> Employer authorization for expenses (T2200) |
| <input type="checkbox"/> Pension T4A, T4OAS, or T4AP slips | <input type="checkbox"/> Automobile expenses (if eligible) |
| <input type="checkbox"/> Employment insurance slips | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Employment and commission expense receipts/details | |

Self-Employment Income

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| <input type="checkbox"/> Self-employment income and expenses | <input type="checkbox"/> Automobile expenses |
| <input type="checkbox"/> Business use of home expenses | <input type="checkbox"/> Other: |

Investment Income

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|--|---|
| <input type="checkbox"/> RRSP contribution slips | <input type="checkbox"/> Interest paid on non-registered investments |
| <input type="checkbox"/> RRSP, DPSP, RPP, RRIF, RESP withdrawal slips | <input type="checkbox"/> Investment counsel fees |
| <input type="checkbox"/> Interest/Dividends/Capital gains T5/T5013 slips | <input type="checkbox"/> Mutual fund investment summary statements |
| <input type="checkbox"/> Estates/Trust/Mutual fund T3 slips | <input type="checkbox"/> Foreign income and foreign tax paid |
| <input type="checkbox"/> Other investments T5013/T5008 slips | <input type="checkbox"/> List of foreign properties owned (Cost over \$100,000) |
| <input type="checkbox"/> Summary of gains and losses | <input type="checkbox"/> Other: |

Real Estate and Rental Income

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|--|---|
| <input type="checkbox"/> Rental income and expenses | <input type="checkbox"/> Sale of real estate – Lawyer statement of adjustments |
| <input type="checkbox"/> Change in use of property (principal residence to/from rental property) | <input type="checkbox"/> Sale of real estate – Details (incl. principal resident) |

Tax Deductions and Credits

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|--|---|
| <input type="checkbox"/> Charitable donation receipts (Indicate if gift "in-kind") | <input type="checkbox"/> Tuition amounts transferred from a child |
| <input type="checkbox"/> Political donation receipts | <input type="checkbox"/> Student loan interest statements |
| <input type="checkbox"/> Medical expense receipts/details | <input type="checkbox"/> Union/professional dues |
| <input type="checkbox"/> Moving expense receipts/details | <input type="checkbox"/> Accounting fees paid |
| <input type="checkbox"/> Childcare expense receipts/details | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Tuition fees paid (T2202A – signed by student) | |