

Name <input style="width:90%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
M	M	D	D	Y	Y	Y	Y							
Address <input style="width:98%;" type="text"/>														
Did you move since last year's filing? <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>Y</td><td>N</td></tr></table>	Y	N	S.I.N. <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td></tr></table>				-				-			
Y	N													
			-				-							
Phone <input style="width:90%;" type="text"/>	Email <input style="width:90%;" type="text"/>													
Occupation/Employment <input style="width:90%;" type="text"/>	Marital Status <input style="width:90%;" type="text"/>													
Name of Spouse or Common Law Spouse <input style="width:98%;" type="text"/>														
Income of Spouse if we are not preparing <input style="width:90%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
M	M	D	D	Y	Y	Y	Y							
S.I.N. <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td></tr></table>				-				-						
			-				-							
Dependent <input style="width:98%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
M	M	D	D	Y	Y	Y	Y							
S.I.N. <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td></tr></table>				-				-						
			-				-							
Dependent <input style="width:98%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
M	M	D	D	Y	Y	Y	Y							
S.I.N. <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td></tr></table>				-				-						
			-				-							
Dependent <input style="width:98%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
M	M	D	D	Y	Y	Y	Y							
S.I.N. <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td><td>-</td><td> </td><td> </td><td> </td></tr></table>				-				-						
			-				-							

---

Did you sell your primary residence in 2017? 

Y	N
---	---

Are you a Canadian Citizen? 

Y	N
---	---

Do you agree to allow CRA to provide your personal information to Elections Canada? 

Y	N
---	---

Did you own foreign property that cost more than \$100,000 Cdn? 

Y	N
---	---

Do you require your return completed by a certain date, if so please state date 

M	M	D	D	Y	Y	Y	Y
---	---	---	---	---	---	---	---

How were you referred to us (please check)

The Shoppes Publications    Internet    Referral    Yellow Pages

Other

---

	YES	NO	N/A
<b>Did we prepare your 2016 return?</b> <i>If we did not prepare your 2016 tax return, please enclose this along with information on any carry forward amounts not included in those returns</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Was your 2016 tax return assessed as filed?</b> <i>Please enclose a copy of the 2016 assessment.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Did you pay tax installments in 2017?</b> <i>If yes, please indicate the amounts paid. Federal installments</i> <input style="width:150px;" type="text" value="\$"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>If you are entitled to a refund, do you wish it to be deposited directly into your bank account?</b> <i>(Attach a voided personalized cheque; indicate if this is to apply to all refunds or specific ones: income tax, GST credit)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**INCOME**

- Provide all slips (T4, T5, T3, T4RSP etc.)
- Do you have rental income?
- Do you receive alimony or taxable child support? Did this start in 2017?
- Did you sell investments, real estate, etc.? Please provide Capital gain/loss statement.
- Do you have business income?
- Do you receive any bursaries?
- Do you have any other sources of income?

**DEDUCTION & CREDITS**

- Provide all slips (ie. RRSP, donations, tuition, union dues, etc). If you have donations for 2017, have you or your spouse/common law partner claimed any donation credits in any taxation year after 2012?
- Did you have medical expenses for yourself (including premiums for health insurance), your spouse or common-law partner, or any dependent children (also please include nursing home care and trips to doctors or hospitals over 40km)
- Do you have moving expenses (Moved 40km closer to a new place of work)?
- Do you pay alimony or have deductible child support?
- Do you have child care expenses (including camp)?
- Did you adopt a child during 2017?
- Did you have interest expense as a result of investment activities?
- Did you pay investment advisor fees or fees for accountants relating to your investments?
- Are you, your spouse or dependent disabled? (Form T2201 is required if not previously submitted and approved)<sup>1</sup>
- Do you have attendant care expenses?
- Do you have expenses as a requirement of your employment?  
(ie. Vehicle, home office, supplies, etc. Form T2200 is required)<sup>2</sup>
- Did you use the Home Buyers Program (RRSP) for purchasing your home?
- If you own your home, please provide your property taxes paid.
- Did you purchase a new home in 2017 as a first-time home buyer? Date of purchase:
- If you rent, please provide rental receipts for the year and your landlord's name. \_\_\_\_\_
- Did you purchase transit passes?
- Do you have tuition expenses or examination fees, or did your dependents not claim their entire entitlement to these?
- Did you pay interest on student loans in 2017?
- Are you a volunteer firefighter or a search + rescue volunteer?
- Did you perform renovations on your home in 2017 to make it safer and more accessible for a senior family member?
- Did you have any eligible teaching supplies that were purchased for teachers and early childhood educators only?

1. Can walk 100 metres but only by taking an inordinate amount of time. Receiving life sustaining therapy. Does not have the mental functions necessary for everyday life such as adaptive functioning memory, problem-solving. Is markedly restricted in daily living functions.

2. Please complete the Business Claims and Employment Expenses Form.

**Please call or visit our website for additional checklists.**