

# Tax Filing Form



## PERSONAL INFORMATION

CLIENT LOG #: \_\_\_\_\_

NAME:	PHONE:
ADDRESS:	
EMAIL:	DOB: (MM/DD/YYYY)
SIN:	
MARITAL STATUS: <input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED <input type="checkbox"/> COMMON LAW <input type="checkbox"/> WIDOWED <input type="checkbox"/> DIVORCED	
DID YOUR MARITAL STATUS CHANGE?	IF YES, WHICH DATE?

## SPOUSE INFORMATION

NAME:	PHONE:
ADDRESS:	
EMAIL:	DOB: (MM/DD/YYYY)
SIN:	

## DEPENDANTS

NAME:	DOB: (MM/DD/YYYY)	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
NAME:	DOB: (MM/DD/YYYY)	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
NAME:	DOB: (MM/DD/YYYY)	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
NAME:	DOB: (MM/DD/YYYY)	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE

**Type of Tax Return:**  Personal Return  Self Employ Return

## RRSP (Registered Retirement Savings Plan)

- When claiming RRSP deposits, please state last year's contribution limit, which can be found on your assessment notice. \_\_\_\_\_
- Are you registered for My CRA Account or get your NOA by regular mail? \_\_\_\_\_
- Do you own foreign property or have foreign investments? \_\_\_\_\_
- Did you sell property that you need to claim Capital Gains or Personal Exemption on? \_\_\_\_\_

# Tax Filing **checklist**

## INCOME RECEIPTS

- Employment Income (T4)
- Investment Income (T3, T5 and T5008)
- Employment Insurance Benefits (T4E)
- Tuition (T2202 or TL11)
- Pension and Annuity Income (T4A)
- RRSP and RIF Income (T4RSP and T4RIF)
- CPP and OAS Slips (T4AP and T4A0AS)

## DEDUCTION RECEIPTS

- RRSP Contributions
- Medical Expenses
- Union or Professional (not included in T4)
- Exam fees or professional designations
- Childcare Expenses
- Student Loan Interest
- Children's Fitness Expenses
- Adoption Expenses
- Moving Expenses
- Tools Expenses
- Employment Expenses and T2200

## OTHER DOCUMENTS

- Previous Year Income Tax or CRA
- Disability Tax Credit Assessment
- Dependant's Information:
  - Date of Birth and Net Income(s)
  - Post Secondary Tuition
- Child Support or Alimony Info
- Info about Sale of Principal Residence
- Homebuyer's Plan and Lifelong Learning Plan
- Disability Tax Credit Certificate
- Self Employed and Commissioned Employees:
  - Income and Expenses
  - Vehicle Logbook
  - Home Office Expenses
  - Rental Property Income and Expenses
  - Foreign Income to Declare
  - Personal Property Exemption for Sale