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Please complete the following checklist and return to our office with your personal tax information.

Client: _____

*Address: _____ Names of spouse and dependents _____ Date of Birth _____ Social Insurance Number _____

CONFIRM _____

*Phone Number: _____

*Cell phone Number: _____

*Work phone Number: _____

*email address: _____ (please complete enclosed consent for sending commercial electronic messages)

*Do you want a paper copy _____ or electronic copy _____ of our tax returns? 1 year? _____ 3 years? _____

*Marital Status on Dec 31 (circle one): Single/Married/Common-Law/Separated/Divorced/Widowed
 Date of change (if applicable): _____ (send agreement if applicable)

*Are you registered and do you collect GST from customers? Yes _____ No _____ If yes, are we filing your GST Return? Yes _____ No _____

*Did you sell your principal residence during 2017? Yes _____ No _____

*Are you a Canadian Citizen Yes _____ No _____ If yes, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the Nation Register of Electors? Yes _____ No _____

*Did you own any **foreign property** with a cost of \$100,000 or more at any time in 2017? Yes _____ No _____
 (Including cash, stocks, trust, partnerships, real estate, tangible and intangible property, etc.)

Income (Include all information slips THAT APPLY TO YOU) NOTE: To avoid a failure to report income penalty, please submit any additional/late information slips as soon as possible.

- ____ T4 – Employment income
- ____ T4A – Pensions and other income
- ____ T4E – Employment insurance
- ____ T4PS – Statement of Employee Profit Sharing Plan Allocations and payments
- ____ T4 RSP – RRSP withdrawals
- ____ T4 RIF – RIF payments
- ____ T3 – Trust income (mailed as late as March 31)
- ____ T5 – Interest and dividend income
- ____ Other slips including T10, T2200, T2202, T101, TL11A, B, C and D, T5003, T5007, T5008, T5013, T5018
- ____ Business income (statement of income and expense)
- ____ Farm income (statement of income and expense) Do you have an AgriInvest PIN? Yes _____ No _____ If yes, PIN: _____
- ____ Rental property (statement of income and expense and any legal documents on capital purchases or sales)
- ____ Capital gains & losses realized (including stock and mutual funds)
- ____ Sale of capital property
- ____ Alimony, separation allowances, child maintenance
- ____ Interest income received and or earned but not yet received

Deductions (Please provide all receipts) THAT APPLY TO YOU

- ____ RRSP contributions (please indicate if repayment of LLP- lifelong learning plan or HBP-home buyers' plan)
- ____ RRSP withdrawals for LLP- lifelong learning plan or HBP-home buyers' plan
- ____ Employment expenses (T2200 filled out and signed by employer) **(If deducting motor vehicle expenses, please include a mileage log book.)**
- ____ Tuition receipts (T2202, TL11A, B, C or D)
- ____ Interest paid on student loans
- ____ Investment expenses (interest on money borrowed to purchase investment, & investment counsel fees)
- ____ Public transit passes
- ____ Tradespeople /Apprentice Mechanics –list of **new** tools acquired, T2200 signed by employer and receipts signed by employer
- ____ Union or professional dues
- ____ Charitable donations and/or political contributions
- ____ Alimony, separation allowances or deductible child support payments paid during the year (copy of any new agreement)
- ____ Child care expenses (provide receipts with SIN of provider)
- ____ Adoption related expenses
- ____ Receipts to renovate your home to gain access/increase functionality if you are over 65 or eligible for the disability tax credit.
- ____ Receipts for teaching supplies used in a school/regulated child care facility by a certified teacher/early childhood educator
- ____ Medical expenses for you or your dependents (prescription drugs, dental, private health care premiums, long term care and Medical travel – worksheet provided)
- ____ Moving expenses – if greater than 40 kms for new work or school location
- ____ Travel in a Prescribed Zone – **box 32 on your T4 slip must have \$ amount** (complete travel worksheet)

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