

Welcome to our office
Please take the time to fill in this form so we know that we have received all of the necessary information to complete your income tax return(s):
2017

	YOU			SPOUSE		
LAST NAME						
FIRST NAME						
Birthdate (mm/dd/yy)						
SIN						
Are you a Canadian citizen?	YES	NO		YES	NO	
Did you spend more than 122 days in the US in 2017?	YES	NO		YES	NO	
If yes , have you filed your Form 8840 with the IRS?	YES	NO		YES	NO	
Are you a U.S. Citizen, Green Card Holder or considered to be a U.S. person?	YES	NO		YES	NO	
Tax Returns Included:	2014	2015	2016	2014	2015	2016
Copy of 2016 Notice of Assessment	Included	Can't find		Included	Can't find	
Do you have a "My Account" with the Canada Revenue Agency?	YES	NO		YES	NO	
If yes , and you have not already registered, would you like to receive all communication from the Canada Revenue Agency via email?	YES	NO		YES	NO	

Mailing Address (indicate if there are different addresses for each person above):

Home Phone Number: _____ Fax Number: _____

	YOU	SPOUSE
Cell		
Email		

(We will use these email addresses for our secure portal and any other email communication)

Will you be away for any time before the filing deadline?
If yes provide dates.

What was your marital status on December 31, 2017?
 Married Separated
 Living common-law* Divorced
 Single* Widowed

Was there a change in your marital status during the year or since Dec. 31, 2017?
(ie. Single to Common Law*). YES NO
If yes, what was the change and on what date?

**Living common law means you have lived with someone in a conjugal relationship for 12 consecutive months or you live together and have a child living in your home. If you require a definition of "conjugal", please ask for the detailed definition.*

Province of residence on December 31, 2017: _____

Number of dependent persons who live with you? _____

Please provide the name, SIN, birthdate, citizenship, relationship to you and the amount from Line 236 of their 2017 tax return (if we are not preparing their income tax return).

1. NAME _____ SIN _____ Birthdate*o o l f l { { + _____ Citizenship _____ Relationship to you _____ Copy of 2016 notice of assessment Included Can't find Did not file Tax return included: 2014 2015 2016 Did not file	2. NAME _____ SIN _____ Birthdate*o o l f l { { + _____ Citizenship _____ Relationship to you _____ Copy of 2016 notice of assessment Included Can't find Did not file Tax return included: 2014 2015 2016 Did not file
3. NAME _____ SIN _____ Birthdate*o o l f l { { + _____ Citizenship _____ Relationship to you _____ Copy of 2016 notice of assessment Included Can't find Did not file Tax return included: 2014 2015 2016 Did not file	4. NAME _____ SIN _____ Birthdate*o o l f l { { + _____ Citizenship _____ Relationship to you _____ Copy of 2016 notice of assessment Included Can't find Did not file Tax return included: 2014 2015 2016 Did not file

If additional people live with you, please attach a separate sheet containing all of the above information

Are any of these individuals living with you not having their tax return prepared here?

YES NO

If yes, who and how much is Line 236 of their 2017 tax return?

Where did you hear about us? If you were referred here, then by whom?

Have you set up direct deposit with the Canada Revenue Agency? * YES NO

If no, would you like to start Direct Deposit for all of your tax and benefit accounts?

YES NO

If yes, please request a direct deposit form to fill in and provide a voided cheque.

* Note your direct deposit continues with the Canada Revenue Agency until **you** cancel it.

You have an option of the final delivery of your tax return(s). A PDF copy will be created and will be available as a download from our secure web portal. In addition, you may also request a printed copy. Please check one of these options:	
<input type="checkbox"/>	I would like a printed copy of my tax return(s)
<input type="checkbox"/>	I do not require a printed copy of my tax return(s) and will access the PDF copy

PLEASE READ EACH QUESTION CAREFULLY

<i>1. FOREIGN PROPERTY</i>	YES	NO
Did you answer “yes” to any of the Foreign Property questions? If yes , please provide details.		
<i>2. INCOME</i>		
Do you have any information slips? Please provide all you have: (ie. T3, T4, T4A, T5, T4A(OAS), T4A(P), T4E, T4RIF, T4RSP, T10, T5007, T5008, T5013, T5018, etc.)		
Do you have any other income earned but not reported on a T-slip? (ie. Contract work, honorariums, directors fees) Please specify:		
Does anyone covered on this checklist work in the hospitality industry (ie, restaurant, casino, hotel, tourism, spa, salon)? If yes , please fill in the Tips Declaration Form .		
Have you received any incentive rebate payments related to your work that has not been reported on a T-slip or your business income? If yes , please provide details.		
<i>3. CHILDREN</i>		
Do you have dependent children? <i>If no, please proceed to section 4</i>		
Are you married to or living common-law with the other parent of your child(ren)? If no , would you like information about the possibility of splitting the Canada Child Benefit?		
Did you adopt a child in 2017? If yes , provide details of all adoption expenses.		
Did you incur child care expenses? (ie. daycare, camps – 5 day min) If yes, provide receipts.		
Do you have children attending post-secondary schooling? If yes , are they transferring their tuition and education amounts to you? If your child is transferring their tuition amounts to you, please provide a T2202A signed by the child.		
<i>4. DIVORCED OR SEPARATED</i>		
Have you ever been divorced or separated? <i>If no, please proceed to section 5</i>		
Do you pay or receive spousal support or child maintenance? If yes , provide a signed copy of the court order and details of amounts paid and received.		

	YES	NO
Did you incur legal costs during the year to collect late support payments, establish the amount of support payments you would receive, increase the support payments you receive or to vary an existing child support agreement where you are the recipient? <i>If yes, provide receipts.</i>		
5. SENIORS		
Are you or your spouse a senior? <i>If no, please proceed to section 6</i>		
Do you or your spouse receive CPP? <i>If yes, are you aware of the child rearing drop out provision and did you apply for it if you were entitled to it?</i>		
Will you have your 65 th to 70 th birthday this year? <i>If yes, are you still employed?</i> <i>If yes, have you filled in a CPT30?</i>		
Do you or your spouse receive a pension other than CPP or OAS? <i>If yes, would you like to minimize income taxes by splitting the taxable pension amount?</i>		
Do you or your spouse receive pension from a foreign country? <i>If yes:</i> AMOUNT _____ (Cnd \$) COUNTRY _____ Provide documentation, if available.		
If you receive US Social Security, have you been receiving it since before January 1, 1996?	N/A	
6. SAVINGS OR INVESTMENTS		
Do you or your spouse have savings accounts or investments? <i>If no, please proceed to section 7</i>		
Did you make RRSP contributions? Have you participated in the Home Buyers Plan? Have you participated in the Life Long Learning Plan?		
Do you have a Tax Free Savings Account (TFSA)? <i>If yes, did you receive a penalty letter from the Canada Revenue Agency claiming that you had over contributed? (If yes, provide a copy of letter.)</i>		
Do you have Canada Savings Bonds? <i>If yes, please provide details of interest earned.</i>		
Do you own strip bonds? <i>If yes, please provide details of investment.</i>		
Did you pay interest on money borrowed to invest?		
Do you have other investments outside your RRSP and TFSA? <i>If yes, provide details of your other investments (real estate, oil and gas, labour sponsored funds).</i>		
Did you pay fees for investment advice outside your RRSP or TFSA? <i>If yes, please provide details.</i>		

	YES	NO
Did you invest in crypto or digital currencies (ie. Bitcoins) and realize a gain or loss in 2017? If yes , please provide details.		
Did you sell any investments? (ie. Stocks, bonds, mutual funds, etc.) If yes , please provide details on the sale (<i>sale amount, original cost, elected amount from 1994</i>) and/or a gain/loss report for sales of stocks, bonds, mutual funds, ETFs, etc.		
Do you or your spouse have unrealized losses in your individual investment portfolio? If yes , did the spouse who did not have the unrealized losses incur tax on capital gains in the last three years?		
Did you convert any investments (outside of your RRSP or TFSA) from one name to another? (ie. Did you exchange mutual fund A for B or Trust Fund A to Corporation A)?		
Did you have a loss on any investments and then buy them back within 30 days? Please provide detailed documentation.		
7. STUDENTS		
Was anyone included on this checklist a student in 2017 or have tuition credits carrying forward? <i>If no, please proceed to section 8</i>		
Did you pay tuition fees? If yes , provide the T2202A .		
Were you enrolled full time in a post secondary institute?		
Were you enrolled part time in a post secondary institute?		
Did you pay additional fees for exams or other mandatory fees in anticipation of earning a professional status or trade? If yes , are these fees included on your T2202A? If not, provide receipts.		
Do you have tuition amounts carrying forward and have changed your province of residence since attending school?		
8. MOVING OR RENOVATING		
Did you move or renovate in 2017? <i>If no, please proceed to section 9</i>		
Did you incur moving expenses? If yes , please fill out the Moving Expenses checklist.		
Did you move into a newly built home or did you renovate at least 90% of your home in 2016 or 2017? (to qualify, you must have moved interior walls) If yes , have you claimed the GST credit yet?		
Did you become the owner of a home in 2017? If yes , had you owned another home within the last 5 years?		
Are you or anyone living in your household age 65 or older OR entitled to the disability tax credit and did renovations on your home? If yes , please provide copies of all home renovations that you paid to gain access, enhance mobility, or reduce the risk of harm of living in your home.		
9. REAL ESTATE		
Did you sell or have your name removed off title of any real estate in 2017? (This may include land, home, vacation property, business, farm, investment, or rental property - inside or outside Canada) (Section 1 or 4)		

	YES	NO
Did you change all or some of your personal residence to a rental property in 2017? (Section 2)		
Did you convert a rental property that you own to your personal residence in 2017? (Section 3)		
If yes , to any of the above real estate questions, please fill in a Real Estate Checklist (section indicated above).		
10. OTHER DEDUCTIONS		
Are you paying off government sponsored student loans? If yes , provide details of interest paid.		
Did you, your spouse or your children (under 19) purchase monthly (or longer duration) transit passes before July 2017? If yes , please provide transit passes and receipts for January to June 2017.		
Did you pay a fee to prepare your 2016 tax return? If yes , provide the receipt.		
Did you pay professional dues or union dues? (If not included on your T4, please provide receipts)		
Did you make charitable donations? If yes , provide receipts. Did you or your spouse make donations and claim the deduction on either tax return anytime from 2008 – 2017?		
Did you make political contributions?		
Did you pay for medical expenses? If yes , provide all receipts. (This includes private health plan premiums, prescriptions, glasses, dental work, chiropractor, fertility treatments, nursing care and many others. This also includes all dependents living with you who you paid medical expenses for.) Please EXCLUDE any cosmetic procedures. If you are unsure if it is cosmetic or medical, please ask us. (Note: fertility treatments not claimed in the past 10 years may be claimed.)		
Were you required to travel for a medical service not available within 40 km of your home? If yes , please provide details.		
Are you or someone in your immediate family disabled? If yes , is this an ongoing claim? If this is your first claim , provide a signed T2201 from your doctor.		
Are you the caregiver for any infirm family members? If yes , list the family member and their infirmity.		
Do you or does someone on this checklist have any of the following medical conditions? (<i>Some illnesses may provide additional deductions on your income tax return.</i>) <ul style="list-style-type: none"> • Celiac disease? • Epilepsy? • Type 1 Diabetes? • Other (please specify) _____ Who has the condition and how long have they had it? Name: _____ How Long: _____		

	YES	NO
<p>Did you live in a prescribed Northern zone for 6 consecutive months in 2017? If yes, please provide details: Dates: _____ Address: _____ Number of persons living with you and their relationship to you:</p>		
<p>Did you prepay tax installments for your 2017 tax return? If yes, provide proof of payment.</p>		
<p>Are you an emergency volunteer who received an honorarium for your volunteer work?</p>		
<p>Are you a member of a volunteer fire department where you participated in at least 200 hours of service during the year?</p>		
<p>Are you a Search and Rescue member who volunteered at least 200 hours of service during the year?</p>		
<p>Are you a member of the clergy? If yes, provide a T1223</p>		
11. SELF EMPLOYMENT		
<p>Do you have an unincorporated business other than farming? If yes, please fill in the Business Checklist.</p>		
<p>Do you participate in high volume internet sales of at least \$1,000 per month? If yes, please fill in a Business Checklist.</p>		
<p>Do you farm? If yes, please fill in the Farm Checklist.</p>		
<p>Do you own rental property? If yes, please fill in a Rental Checklist for each property.</p>		
<p>Have you received money or any other commodity as a result of listing personal assets for use by others besides family or friends (the sharing economy)? If yes, please fill in the appropriate Business or Rental Checklist.</p>		
<p>Did you operate a business and pay interest on personal loans? <i>If yes, please ask Valerie how to possibly convert this to a business expense.</i></p>		
<p>If you are self employed, have you opted into the EI program for special benefits?</p>		
12. EMPLOYMENT EXPENSES (& APPRENTICES)		
<p>Were you required to pay employment expenses? If yes, fill in the Employee Expense Checklist.</p>		
<p>Are you an employed teacher or early childhood educator who paid for consumable supplies used at work that you were not reimbursed for? If yes, provide the required certification from your employer and copies of your receipts.</p>		
<p>Are you an apprentice? If yes, have you applied for and received the grants you are entitled to?</p>		
<p>Were you an apprentice mechanic or tradesperson and spent more than \$1,178 on <u>new</u> tools in 2017? If yes, provide receipts and a signed T2200.</p>		
<p>Are you an employee in the transport industry and have expenses to claim? If yes, fill in the Transport Employee Checklist.</p>		

	YES	NO
13. OTHER INFORMATION		
Do you have a will?		
Would you like information about RESPs for your children or grandchildren?		
Would you like information about grants and bonds available from the federal government for people under 60 with a disability?		