

<b>Personal information</b>				
First name :		Last name :		
Street address :		City :		Province :
Postal code :	Birthdate: yyyy / mm / dd		Last 4 digits of your SIN	
Marital Status:	Canadian citizen		American citizen	
Cell phone:		Home phone:		
Email:				
<b>Completing return for spouse/partner?</b> Y      N      If no, please provide <b>Net Income: \$</b> <u>AMOUNT</u>				
Spouse/partner First Name		Last Name		
Birthdate    yyyy / mm / dd		Last 4 digits of SIN #		
<b>Dependents (children or senior parent living with you) (use notes section if more space needed)</b>				
Name	Address (if different)	Relationship	Birthdate	SIN:Last 4 digits
			yyyy / mm / dd	
			yyyy / mm / dd	
<b>Please answer all the following questions</b>				<b>Yes      No</b>
Do you own investments or property outside of Canada, which cost more than \$100,000 CDN?				
Did you sell any property ?				
Were you a first time homebuyer ?				
Did you purchase any new investments or change investment advisors? If you invest, do you borrow money to do so?				
Did you work from home, due to COVID? If Yes, How many days?				
Have you had any additions to your family this year? Any newborn children? Elderly family members moved in with you?				
Has your marital status changed? Have you started residing with a partner or stopped living with one?				
Have your children started post-secondary schooling? Did they move to attend school?				
Have there been any changes in your health that we should know about? Do you have issues with mobility, sight or hearing?				
Did you change jobs during the year?				
Did you retire in the year?				
Do you want to provide your address and information to Elections Canada?				
<b>Additional Notes and Questions – Please provide details if you have had family changes/dates (birth, marital status, death). Write here all your questions and we will get in touch with you once we check your information</b>				

**For self-employed individuals / sole proprietors**

Would you like us to summarize your expenses?

Yes, please summarize (extra cost at \$85/hour)

No, I've already summarized

Is your business or rental property registered for HST/GST?

Filing period: Regular Quick

Would you like us to complete your HST/GST return?

Yes (please include required documents)

No (please provide copy of HST/GST filed)

**Secure delivery of my completed taxes**

We will provide a digital copy of your completed Personal Tax Return through our secure delivery portal.

*\*A paper copy can be provided upon request.***PLEASE CHECK THE ITEMS THAT APPLY TO YOU****Personal Income**

T4, T4A – Salaries and employment

Other employment benefits

T4A (P) – Canada Pension Plan benefits

T4A (OAS) – Old Age Security benefits

T4A – Other pension or superannuation

T4RSP – RRSP income

T4RIF – RRIF income

T4E – Employment Insurance benefits

T5007 – WCB benefits/social services benefits

T1137 – Home Buyers Plan

T4RCA – retirement income

**Investment Income**

T3, T5, T4S – Interest and Dividends

T5008 – Statement of Security Transactions

Interest on Tax Refunds

T600 – Canada Savings Bonds

T3 – Mutual Fund Income

Foreign income

Annuities

Rental income (full details required)

Summary of investment contract holdings

T5013 – Limited partnership income (loss)

Capital gain/losses (full details required)

**Other Income**

Alimony received

Child support received

Scholarships/bursaries

Other – specify: OTHER INCOME SOURCE

**Business Earnings**

Self-employment earnings (details required)

Farming/fishing earnings (details)

Professional earnings (details)

Self-employment commissioned earnings (details)

**Refundable & Non-refundable Credits**

Married amount – spouse's net income \$ AMOUNT

Equivalent to married amount (full details required)

Disability deductions

T2202 – tuition fees

Dependent Tuition Credit or Net Income \$ AMOUNT

Medical receipts

Charitable donations

Attendant care expenses

Limited partnership losses of other years

Education Coaching Amount (BC)

Eligible Educator School Supply Tax Credit

Volunteer Firefighter Credit

Search and Rescue Credit

**Other Deductions**

RRSP

Union/professional dues

Alimony paid

Child support paid

Interest paid on student loans

Interest and carrying charges on investments

Investment counsel and accounting fees

Employment expenses  
(details required, form T2200 or T2200 S)

Deductible legal fees

Child care expenses

Moving expenses (details required)

TL2 – Claim for boarding and lodging

**Additional documents**

Restricted farming losses carry forward

Prior year Notice of Assessment

Installment payments for current year

Details of foreign property or investments held

Capital and non-capital losses carry forward

**Other items**

Political contribution receipts

Allowable business investment loss

Employment insurance benefit repayments

Dependent data (GST credit and child tax benefit)

Declaration of conditions of employment

Loss carry forward information

First time homebuyer

Sale of principal residence

**IF THIS IS YOUR FIRST YEAR FILING WITH US,  
PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN.**