

Full Name _____ Phone _____
Address _____ Date of Birth _____
Email _____

Marital Status:- ☐ Single ☐ Married ☐ Common Law ☐ Widow | Widower

Did your marital status change? _____ If yes, which date? _____

Spouse Information:-

Full Name _____ Phone _____
Address _____ Date of Birth _____
Email _____

Dependents:-

Full Name _____ Date of Birth _____
Full Name _____ Date of Birth _____
Full Name _____ Date of Birth _____

RRSP (Registered Retirement Savings Plan) :-

When claiming RRSP deposits, please state last year's contribution limit which can be found on your assessment notice

Any notes for us:-

Income Receipts:-

- ☐ Employment Income (T4)
- ☐ Employment Insurance Benefits (T4E)
- ☐ Pension & Annuity Income (T4A)
- ☐ CPP & OAS Slips (T4AP & T4AOAS)
- ☐ Investment Income (T3,T5,&T5008)
- ☐ Tuition (T2202 or TL11)
- ☐ RRSP & RIF Income (T4RSP & T4RIF)

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 & Art Expenses
- ☐ Adoption Expenses
- ☐ Moving Expenses
- ☐ Tools Expenses
- ☐ Employment Expenses & T2200

Other Documents:-

- ☐ Previous Year Income Tax or CRA Assessment
- ☐ Disability Tax Credit Certificate
- ☐ Dependent's Information
 - Birthday(s) & Net Income(s)
 - Post-secondary tuition
- ☐ Self-Employed people & Commissioned Employees
 - Income & Expenses
 - Vehicle Logbook
 - In-Home Office Expenses
- ☐ Child Support or Alimony Info.
- ☐ Info. about sale of Principal Residence
- ☐ Homebuyer's Plan & Lifelong Learning Plan
- ☐ Rental Property Income & Expenses