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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| PERSONAL INFORMATION | | | | | | | | | | |
| Full Nam | | | S.I.N. | | | | Birthdate | | Citizenship | |
| Apt./Suite – Building Number Street Name, City, Postal Code | | | | | | | | | Marital Status | |
| Phone | Cell | Fax | | | | Email | | | | |
| Any family members disabled? YES  NO | | | | | Are you a Northern Resident? YES  NO | | | | | |
| SPOUSE INFORMATION | | | | | | | | | | |
| Full Name | | | S.I.N. | | | | Birthdate | | Citizenship | |
| CHILDREN INFORMATION | | | | | | | | | | |
| Full Name – Child 1 | | | S.I.N. | | | | Birthdate | | Citizenship | |
| Attending Post-Secondary Education? YES  NO  - *If yes please attach T2202A* | | | | | | | | Amounts for fitness/arts: | | |
| Full Name – Child 2 | | | S.I.N. | | | | Birthdate | | Citizenship | |
| Attending Post-Secondary Education? YES  NO  - *If yes please attach T2202A* | | | | | | | | Amounts for fitness/arts: | | |
| Full Name – Child 3 | | | S.I.N. | | | | Birthdate | | Citizenship | |
| Attending Post-Secondary Education? YES  NO  - *If yes please attach T2202A* | | | | | | | | Amounts for fitness/arts: | | |
| SALE OF PRINCIPAL RESIDENCE | | | | | | | | | | |
| Did you sell your primary residence during the year? | | | | | | | | | Yes | No |
| INCOME SOURCES CHECKLIST | | | | | | | | | | |
| Employment T4 or T4A slips | | | |  | RRSP, DPSP, RPP, RRIF, RESP | | | | |  |
| Pension (T4/T4OAS/T4AP) | | | |  | Estates/Trusts/Mutual Fund T3 | | | | |  |
| Employment Insurance | | | |  | Universal Child Care Benefit RC62 | | | | |  |
| Interest/Dividends/Capital Gains T5/T5013 | | | |  | Other: | | | | |  |
| Other Investments T5013/T5008 | | | |  | Other: | | | | |  |
| TAX DEDUCTIONS / CREDITS CHECKLIST (with official receipts) | | | | | | | | | | |
| RRSP Contribution | | | |  | Student Loan Interest Statement | | | | |  |
| Union/Professional Dues | | | |  | Medical Expenses | | | | |  |
| Child Care Expenses (Incl. Name & SIN of Recipient) | | | |  | Disability Certificate (T2201) | | | | |  |
| Child Fitness/Arts Expenses | | | |  | Charitable Donations (Indicate if gift “in-kind”) | | | | |  |
| Moving Expenses | | | |  | Political Donations | | | | |  |
| Accounting Fees | | | |  | Monthly Transit Passes | | | | |  |
| Interest Paid on Non-Registered Investments | | | |  | First-time Home Buyer | | | | |  |
| Investment Counsel Fees | | | |  | Other: | | | | |  |
| Tuition Fees (T2202A – Signed by Student) | | | |  | Other: | | | | |  |
| OTHER IMPORTANT DOCUMENTS CHECKLIST | | | | | | | | | | |
| Notice of (Re)Assessment for Prior Year(s) | | | |  | Sale of Shares/Investments Summary | | | | |  |
| Mutual Fund Investment Summary Statement | | | |  | Tax Shelters | | | | |  |
| Sale of Property – Details | | | |  | T2200 Employer Authorization for Expenses | | | | |  |
| Sale of Real Estate – Lawyer Stmt. of Adjustments | | | |  | T1135 Foreign Property over $100,000 | | | | |  |

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| --- | --- | --- | --- |
| OTHER INFORMATION CHECKLIST (please provide if necessary) | | | |
| Employment/Commission Expenses |  | Spouse’s Net Income |  |
| Automobile Expenses (If Eligible) |  | Signed T1 Engagement Letter |  |
| Alimony/Maintenance Paid or Received |  | Direct Deposit information (Blank cheque) |  |
| Dependent’s Income |  | Other: |  |
| Foreign Income and Foreign Taxes Paid |  | Other: |  |
| List of Foreign Property Owned |  | Other: |  |
| Income Tax Instalments Paid |  | Other: |  |
| Rental Income and Expenses |  | Other: |  |
| Self-Employment Income and Expenses |  | Other: |  |