

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

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