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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: | [ ]  |