

Date _____
 Name _____
 Birth date _____
 SIN _____
 Address (if different than previous year)

Tax year _____
 Spouse: _____
 Birth date _____
 SIN _____
 Phone Home _____
 Phone Cell _____
 Email Address _____

Tax slips for the following income

Employment (T4)
 Pension [T4A, (OAS), (P)]
 Employment insurance (T4E)
 Dividends & Interest (T5)
 RRSP, DPSP, RPP, RRIF (T4RSP, T4RIF)
 Estates, Trust, Mutual funds (T3, T5013)
 Universal child care benefit (RC62)
 WCB / Social Assistance (T5007)
 Scholarships, Grants, RESP's (T4A)

Documents for the following transactions:

Prior year's Notice of Assessment
 Shares / Stocks / Bonds
 RRSP / home buyer's plan / LLP
 Sale of property

Details of:

Alimony / support payments
 Income tax installments
 Rental property income / expenses
 Self-employment income / expenses
 Farming activities income / expense
 Volunteer firefighter's information
 Employment expenses (T2200 must be provided)

Receipts for the following deductions:

RRSP contributions
 Union / Professional dues
 Child care expenses
 Moving expenses
 Interest paid on student loans
 Investment fees and interest
 Tuition fees (T2202A)
 Medical expenses
 Charitable donations
 Political donations
 Bus passes
 Children's Arts amount
 Children's Fitness amounts
 Adoption expenses
 Tradesperson's / mechanic tools

Other information:

Marital status at December 31
 Single
 Married
 Common-law
 Separated/divorced
 Dependents not on last year's return
 Name _____
 Date of birth _____