



Personal Information

Spouse Information (If Applicable)

Name:
SIN Number:
DOB:
Phone /Cell #:
E-mail:
Address:
City:
Province:
Postal Code:

Name of Spouse:
SIN Number:
DOB:
Phone /Cell #:
E-mail:
Address:
City:
Province:
Postal Code:

Marital Status: Single Married Common-Law Separated Divorced Widowed

Please list all dependants below:

Table with 5 columns: Name, Relationship, Birthday (MM/DD/YY), SIN #, Net Income During. Includes three rows for dependants.

Receipts and Information Slips

- Information slips (T3, T4, T4A, T5, T4RSP, T4E, T4P, T4A(OAS), T4RIF, T5013, RC62, etc.)
RRSP contribution slips
RRSP home buyers plan / lifelong learning plan statements
Tuition fee slips (T2202)
Union or professional dues receipts
Official charitable/political donation receipts
Medical expense receipts for yourself and your dependents
Student loan interest receipts
Statement of interest paid for business or investment loans
T2200 (Statement of Conditions of Employment) signed by employe

Self-Employment Income and Expenses

- Detailed listing of self-employment income and expenses for the year
Details on all fixed asset additions and/or disposals
Number of kilometers driven for business purposes and total kilometers driven for the year
Area of home used for business purposes and total area of home (sq. ft.)
Business number and copies of HST returns filed.

Other Income and Deductions

- Amount of spousal support paid or received
Other pensions not included in information slips
Sale of stocks, bonds, mutual funds or real estate
Number of units
Sales proceeds
Adjusted cost bases
Commission
Investment broker statements
Child care expenses - including caregiv ers name and SIN (for individuals only)
Child fitness and arts expenses
Moving expenses
Investment counsel/management fees
First-time home buyer ? (acquisition date of home)

Rental Income and Expenses

- Detailed listing of rental income and expenses.
Details on all property repairs/maintenance and fixed asset additions for the year

Please provide the following documents:

- 1. Latest Notice of Assessment
2. Last year's tax return OR a copy of the last return you filed

Other Information or Notes