

Personal Income Tax Information for 2018

Name(s): _____ Phone: (H) _____
 Address: _____ (W) _____
 _____ E-mail: _____

Please complete all of the following items applicable to your personal income tax return(s):

Current marital status: _____ (If you are married or common-law, and we are not preparing your spouse's return, please provide your spouse's name, SIN, birth date and 2018 net income)

How many dependants do you have? _____ **Please provide names and birthdates of new dependants.**

Did you own any foreign property and/or investments at any time during 2018? YES NO

Did you dispose of any real estate property in 2018, including a principal residence? YES NO

Do you own any non-registered investments? YES NO **If yes, please provide statements for 2018.**

Is everyone included on this form a Canadian Citizen? YES NO If no, please provide details.

Does everyone included on this form agree to provide information to Elections Canada? YES NO

Please review the following lists in detail, place an (X) beside the items applicable to your personal tax return(s) and provide the information to our office:

Information slips for the following income:

<input type="checkbox"/>	Employment (T4)	<input type="checkbox"/>	RRSP, DPSP, RPP, RRIF income slips (T4RSP) (T4RIF)
<input type="checkbox"/>	Pension and other (T4A)	<input type="checkbox"/>	Mutual Funds/Estates/Trusts (T3)
<input type="checkbox"/>	Old Age Security (T4OAS)	<input type="checkbox"/>	Interest (T5/T600)
<input type="checkbox"/>	Canada Pension Plan (T4AP)	<input type="checkbox"/>	Partnership Income (T5013)
<input type="checkbox"/>	Employment Insurance (T4E)	<input type="checkbox"/>	Treasury Bills (TBD(1) or (2))
<input type="checkbox"/>	Dividends (T5)	<input type="checkbox"/>	Other:
<input type="checkbox"/>	Share dispositions (T5008)	<input type="checkbox"/>	

Receipts and details for the following deductions or credits:

<input type="checkbox"/>	RRSP contributions	<input type="checkbox"/>	Interest paid (re: investments and student loans)
<input type="checkbox"/>	Union/professional dues	<input type="checkbox"/>	Split pension income between spouses? Y or N
<input type="checkbox"/>	Child care expenses	<input type="checkbox"/>	Real estate sales / costs (including principal residence)
<input type="checkbox"/>	Moving expenses	<input type="checkbox"/>	Employment expenses (T2200)
<input type="checkbox"/>	Accounting and investment counsel fees	<input type="checkbox"/>	In home care of a parent or dependent senior (<i>provincial</i>)
<input type="checkbox"/>	Adoption expenses	<input type="checkbox"/>	Care of infirm dependants (<i>federal</i>)
<input type="checkbox"/>	Charitable donations	<input type="checkbox"/>	Expired bus passes and receipts (<i>Jan-June</i>)
<input type="checkbox"/>	Tuition and Education (T2202)	<input type="checkbox"/>	Teacher and Early Childhood Educator supplies
<input type="checkbox"/>	Political contributions	<input type="checkbox"/>	Other:
<input type="checkbox"/>	Medical expenses (<i>including travel costs</i>)	<input type="checkbox"/>	

Provide details of:

<input type="checkbox"/>	Foreign property owned at any time in 2018	<input type="checkbox"/>	Farming income and expenses (including all sales tickets)
<input type="checkbox"/>	Systematic withdrawal from mutual funds	<input type="checkbox"/>	Rental income and expenses
<input type="checkbox"/>	Income tax installments	<input type="checkbox"/>	Self employment income/expense
<input type="checkbox"/>	Canada savings bonds details	<input type="checkbox"/>	Matrimonial support paid or received (SIN of recipient)
<input type="checkbox"/>	Dependant's income	<input type="checkbox"/>	Notices of Assessment or Reassessment
<input type="checkbox"/>	Dependant's education deductions (T2202)	<input type="checkbox"/>	Changes in address, marital status or dependants
<input type="checkbox"/>	Disabled taxpayer or dependants	<input type="checkbox"/>	Void cheque if you wish refunds to be direct deposited
<input type="checkbox"/>	Foreign income	<input type="checkbox"/>	Websites in which internet sales have been transacted
<input type="checkbox"/>	Tradesperson tool purchases during 2018	<input type="checkbox"/>	<i>Other (including bitcoin transaction, etc).</i>

