

Information we are waiting for:

Questions:

Client Information - 2017 TAX YEAR

How late can we call? _____ Date & Time in: _____

Client Last Year: Yes/No _____ Single/Couple _____ 1013 signed _____ yes / No

Name _____

Is your address the same as last year? _____ Yes / No

Address If different: _____

Male D.O.B. _____ Female DOB _____

Ph.(hm) _____ (wk/cell His) _____ (wk/cell Hers) _____

Marital Status as of 31 Dec. 2017 _____ if marital status changed, date of change _____

If changed to CL date you moved in together? _____

On. Rent(Rec.Reg.) _____ address if dif. from above, & landlord _____

Prop.Tax(actual amnt. req.) _____

Approx Inc. of Spouse(if not filing here) \$ _____ Name: _____ SIN: _____

Dependents living with you:

_____ DOB _____ M | F Income _____

_____ DOB _____ M | F Income _____

_____ DOB _____ M | F Income _____

Do you authorize pension splitting if either of you collect a pension? _____ Yes / No

Were any healthy homes renos. done for srs.(over 65) _____ Yes / No

*****Do you or anyone in your family have a disability or impairment? Family member must be dependent on you for food, clothing or shelter. Disabilities incl. learning, diabetes, mental functions, speaking, hearing, vision etc.(1013): _____ Yes / No

Any childcare expenses, incl. day camp:(name & address of sitter req.) _____ Yes / No

Any RSP contributions? (RSP's in 1st 60 days of this year must be claimed on this tax return?) _____ Yes / No

Did you move at least 40kms closer to a new place of employment?(R.R.) _____ **Yes / No**

Did you pay or receive spousal support:(R.R.) _____ **Yes / No**

If yes we need the break down for - Spousal\$ _____ Child \$ _____

Any capital gains to report:(i.e. did you sell a 2nd property or stocks?) _____ **Yes / No**

Did you sell your primary res. in 2017? If yes; year purchased _____, price sold for _____ **Yes / No**

Is anyone a volunteer as either a firefighter or search & rescue person? _____ **Yes / No**

Are you a first time home buyer? _____ **Yes / No**

Any tuition paid for yourself or transferred from a dependents: _____ **Yes / No**

If yes were you reimbursed for any of this tuition? _____ **Yes / No**

Any med. Exp. totaling over 3% of income:(R.R.) _____ **Yes / No**

If yes reimbursed for any of it? _____ **Yes / No**

Do you have charitable donations? _____ **Yes / No**

Any monthly or annual public transit passes from Jan. – Jun. 2017? _____ **Yes / No**

Did you pay any interest on any student or investment loans: _____ **Yes / No**

Union or Professional dues:(R.R.) _____ **Yes / No**

Self Employed?(if new or any changes from last year, go through bus. sheet) _____ **Yes / No**

If self employed: are you HST reg. _____ **Yes / No**

Did you opt into paying EI _____ **Yes / No**

any income from web page _____ **Yes / No**

Rental Income:(if new or any changes from last year, go through rental sheet) _____ **Yes / No**

Employment Exp.: (teaching supplies for teachers now qualify) _____ **Yes / No**

If Yes for employment expenses, T2200 signed: _____ **Yes / No**

OK to give name, address & DOB to Elections Canada: _____ **Yes / No**

*****Foreign investments worth over CAD \$100,000 _____ **Yes / No**

Are you Canadian Citizens _____ **Yes / No**

Have you spent any extended periods of time in the US in past 3 yrs? _____ **Yes / No**

If yes IRS form 8840 must be completed by June 15th

Any other income to report that's not included above(1013 if not sure) _____ **Yes / No**

T183 (E-file Auth.) signed _____ **Yes / No**

Do you want your notice of assessment by: _____ **mail(paper copy) / e-mail**

If by e-mail please provide e-mail address: _____