

Information we are waiting for:

Blank lines for providing information.

Questions:

Blank lines for providing questions.

Client Information - 2018 TAX YEAR

Best e-mail for FTS to contact your family _____

Date & Time in: _____ **How late can MTS call?** _____

1013 signed _____ **yes / No**

T183 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. 2018 _____ **if marital status changed, date of change** _____

If changed to CL date you moved in together? _____

On. Rent(Rec.Req.) _____ **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** _____

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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 any type of mental or physical 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 2018? 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. (including premiums) 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 public transit passes—must be 65 as of 1Jan. 2018. _____ 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**

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

MTS ***Did you opt into paying EI _____ **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**

If you have D.D. with CRA is your banking info. the same as last year? _____ Yes / No