Valleyview Financial Solutions

2019 PERSONAL TAX INTAKE FORM

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VALLEYVIEW FINANCIAL SOLUTIONS

Saving you time and money!

Please complete this form and submit with your documents. You may scan and email to tracy@vvfs.ca or drop off your documents in our secure mailbox at 418 McDiarmid Drive.

NEW CLIENTS: Provide a copy of your 2018 NOTICE OF ASSESSMENT and INCOME TAX RETURN as well.

CLIENT INFO: (If existing client, only complete if any changes apply)

Taxpayer Name:_______________________________ Birth Date: ________________ SIN: ________________

Address: _____________________________ Phone: __________________ Email: ____________________________

Marital Status (please circle): Single Married Common-Law Separated Divorced Widowed

Spouse's Name: ______________________________ Birth Date: ________________ SIN: ________________

Phone: __________________ Email: ____________________________

QUESTIONS:

1. Are you a Canadian citizen? Yes ◯ No ◯

2. Would you like CRA to provide information to Elections Canada? Yes ◯ No ◯

3. Do you want to receive notifications from CRA by email? No confidential information will be transmitted by email. The email notification will be a generic message prompting you to log in to your personal account to view correspondence – including notices of assessment – on CRA's website. Yes ◯ No ◯

4. At any time in 2019, did you own non-Canadian property (real estate that you rented to others, investment accounts, shares in non-Canadian companies, etc.) with a total cost amount of more than C$100,000? Yes ◯ No ◯

5. a. Are you a US person (US citizen or Green Card holder)? Yes ◯ No ◯

   b. For purposes of citizenship mentioned above, do/did you have a US passport, or are/were you a US citizen or US Green Card holders? Yes ◯ No ◯

   c. Did you earn employment income from the US in 2019? Yes ◯ No ◯

6. If you are not a US person, did you spend more than 122 days in the US in any of the past 3 years? If yes, please estimate the number of days (2017 _____, 2018 _____, 2019 _____) Yes ◯ No ◯

7. If your marital status changed during the year, please indicate the date of change: ___________________________

8. Please ensure we have the full names, dates of birth, and SINs for all children or dependants; if applicable:
   ____

9. If you have a spouse or common-law partner and we are not preparing his/her return, please provide the following:
   Spouse's Name: _______________________ SIN: _______________ Net income from line 236: _____________

10. Excluding RRSPs, do you have any investments, own any rental properties, or did you sell your principal residence last year?
    ____

11. Any addition information you would like to provide/any changes: ____________________________________
    .
    ____

INCOME TAX CHECKLIST

Before you drop off or scan your tax documents, use this checklist to ensure you have captured every tax credit and deduction you can.

Slips

- [ ] T4 slips (Employment income)
- [ ] Employment Insurance benefits (T4E)
- [ ] Interest, dividends, mutual funds (T3, T5, T5008)
- [ ] T2202 Tuition and Enrollment Certificate
- [ ] Old Age Security (T4A-OAS)
- [ ] CPP benefits (T4AP)
- [ ] Other pensions and annuities (T4A)
- [ ] Social assistance payments (T5007)
- [ ] Workers' compensation benefits (T5007)
- [ ] All other information slips

Receipts

- [ ] RRSP contributions
- [ ] Charitable donations
- [ ] Political contributions
- [ ] Child care expenses
- [ ] Adoption expenses
- [ ] Support for a child, spouse or common-law partner
- [ ] Tool expenses (Tradespersons, apprentice mechanics)
- [ ] Professional or union dues
- [ ] Other employment expenses
- [ ] Teacher's school supplies
- [ ] Medical expenses
- [ ] Home renovations (seniors and disabled)
- [ ] Moving expenses
- [ ] Interest paid on student loans
- [ ] Carrying charges and interest expenses
- [ ] Office-in-home expenses
- [ ] Exams for professional certification

Other documentation

- [ ] Notice of Assessment/Reassessment
- [ ] Canada Revenue Agency correspondence
- [ ] Sale of principal residence documents
- [ ] Sale or deemed sale of stocks, bonds or real estate
- [ ] Northern residents deductions receipts
- [ ] Rental income and expense receipts
- [ ] Business, farm or fishing income/expenses
- [ ] Automobile / Travel logbook and expenses
- [ ] Disability Tax Credit Certificate
- [ ] Declaration of Conditions of Employment (T2200)
- [ ] Volunteer Firefighters certification
- [ ] Search and Rescue volunteers certification
- [ ] Certification for eligible educator school supplies

Contact us with any questions at:

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