PERSONAL TAX RETURN CHECKLIST

DATE __M__ / __D__ / ___Y___   NEW CLIENT? ☐ Yes ☐ No   TAX YEAR (s) _____

NAME _____ SIN __ __ __ - __ __ __ - __ __ __ Birthdate __M__ / __D__ / ___Y___

EMAIL _____   Cell (_____) _____-_____

ADDRESS_____   Moved since last tax filing? ☐ Yes ☐ No

Marital Status: ☐ Married   ☐ Common-law   ☐ Widowed   ☐ Separated   ☐ Divorced   ☐ Single

Did your marital status change during the year? ☐ Yes   ☐ No   *if yes, provide date*:_____

Are we preparing a tax return for your spouse?   ☐ Yes   ☐ No *If no, please provide full name and net income*:_____

Did you pay ☐ or receive ☐ any spousal support payments in the tax year? $_____

Are you disabled with a current T2201 Disability Tax Certificate? *   ☐ Yes ☐ No

List all Dependents: *(children under 18, adult infirm, or parents/grandparents over 65)*

Name	Relationship	Birthdate	SIN	Net Income	Disabled
_____	_____	_____	_____	_____	☐ Yes ☐ No
_____	_____	_____	_____	_____	☐ Yes ☐ No
_____	_____	_____	_____	_____	☐ Yes ☐ No

Did you pay child support for any of the children above? ☐ Yes ☐ No   Is there a custody agreement?   ☐ Yes ☐ No

Did you pay for daycare for any of the children above? ☐ Yes ☐ No

Did you provide in-home care for parent/grandparent 65 or older or infirm relative? *   ☐ Yes ☐ No

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Did you own foreign property/investments with a total **COST** of more than CDN $100,000? *	☐ Yes ☐ No
Are you a Canadian citizen?	☐ Yes ☐ No
Do you authorize the CRA to provide information about you to Elections Canada?	☐ Yes ☐ No
Do you wish to sign up for CRA ONLINE Mail (instead of paper)? *	☐ Yes ☐ No
Did you sell **ANY** real estate this tax year (including principal residence)? *	☐ Yes ☐ No
Direct Deposit of tax refunds into your bank account? ☐ Currently Set Up	☐ Yes ☐ No
Do you have unregistered investments sold in the year(stocks/bonds etc)?	☐ Yes ☐ No
Have you spent more than 200 hours as a Volunteer Firefighter/Search & Rescue?	☐ Yes ☐ No
Did you **COMPLETE** any level of apprenticeship for the year? * (need certificate of completion)	☐ Yes ☐ No
Did you pay any tuitions for the tax year, or do you have tuition transfer from a dependent? * (need T2202A)	☐ Yes ☐ No
Do you have a rental property?	☐ Yes ☐ No
Do you have employment expenses and (need signed T2200 Form)?	☐ Yes ☐ No
Are you self-employed?	☐ Yes ☐ No

GST # ___ ___ ___ ___ ___ ___ ___ ___ ___ RT ___ ___ ___ ____   (LSA TO FILE?) ☐ Yes ☐ No

CLIENTS' NOTES