



T1 Information Request Form

NAME	S.I.N	Date of Birth (DD/MM/YY)	Phone (Cell)
Taxpayer Name:			
Spouse Name:			
Address		Postal code	Phone (Res.)
EMAIL:			

Is this the first time we are preparing your tax return? **Y / N**

If yes, please provide a copy of last year's return and NOA

Marital Status Married Single Common-law Separate Divorced Widowed

If we are not completing your spouse's return, please provide their 2018 Net Income from line 150 of their tax return \$ _____

1. Are you a Canadian Citizen? **Y / N** Are you a Canadian Resident **Y / N**

2. Did your marital status change during the year? **Y / N**
If yes, please provide the date and status it changed from/to _____

3. Did your immigration or citizenship status change during the year? **Y / N**
If yes, please provide the date and status it changed from/to _____

4. Did you file for bankruptcy during the year? **Y / N**

5. **ELECTIONS CANADA:** The taxpayer authorizes CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information you feel will help us in the preparation of your tax return. **Y / N**

6. **FOREIGN REPORTING:** Did you own or hold foreign property with a total cost of more than \$100,000 CAD at any time during the year? **Y / N**
Include any cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc

7. **PROPERTY INFORMATION:** Has your primary residence address changed in the last year? **Y / N**
If yes, please write your new address:
New Address: _____

Did you sell your principal residence or other real property in the tax year? Y / N
All changes in ownership of property is required to be reported on your tax return. This includes changes of use from principal residence to rental property.

If yes, please provide the following details:

- Address of property _____
- Proceeds of disposition _____
- Year of acquisition _____
- Ownership – sole ownership or joint? _____
- Property used **only** as a principle residence? Y / N

Did you move your residence in order to earn salary, wages, or self-employment income, or to attend an educational institution in a new location in Canada? Y / N

Did your move result in your new residence being **at least 40km closer** to your new place of work or school, compared to your previous residence? Y / N

Did you cease your business or employment at the former location or cease attending your former educational institution? Y / N

Did you sell/purchase real estate, including rental property held for investment purposes? Y / N

Dependents: Any new dependents from the previous year? Y / N

Do any of your dependents have a Disability Tax Credit in place? Y / N

1. Dependents					
Name	Relationship	Date of Birth	S.I.N.	Disabled?	Income

2. Employment Income

Did you earn income from employment? Y / N

If yes, are official slips attached? (T4, T4F, T5007) Y / N

3. Employment Deductions

Do you have any Self-Employment deductions or pay union/professional dues? Y / N

If yes, are official slips attached? (T2200, T4PS) Y / N

4. Pension & Retirement Income

Does you receive Canada Pension Plan Income? (T4A , T4A (OAS), T4ARSP, T4ARIF) Y / N

5. RRSP Contributions & Pension Related Deductions

Did you make RRSP contributions last year? Y / N

Did you make RRSP contributions in the 1st to 60 days of this year? Y / N

If yes, are all official receipts attached? Y / N

6. Investment Income

If you earned investment income outside of your RRSP last year, you will have received T-slips from the payors of that investment income.

Did the taxpayer receive any interest income? (T5, T3, T5008) Y / N

7. Self-Employment / Business Income

Do you have GST? Y / N

Do you file your own GST? Y / N

If you were self employed during the year, please request and fill out the 'Expenses Deductible For Income Tax Purposes By Self-Employed Individuals' form.

8. Rental Income

Do you have rental income? Y / N

If you have rental income, please request and fill out the 'Rental Income' Form

9. Other Income, Other Deductions

Do you have Tuition? Y / N

Do you have any Donations? Y / N

Do you have Child Care Expenses? Y / N

Do you have Alimony? Y / N

Do you have Scholarships? Y / N

10. Additional Information

Please provide any additional information you feel will help us in the preparation of your tax return.

Personal Tax Checklist

Income

- Employment income (T4)
- Employment insurance benefits (T4E)
- Investment income (T3, T5, T5018, T4PS, T5008)
- Old age security and CPP benefits (OAS, T4AP)
- RRSP or other pensions (T4A, T4RSP, T4RIF)
- WSIB & Social Assistance payments (T5007)
- Any foreign Pension (amount and currency)
- Capital gains or losses (buy-sell slips, T5008)
- Subcontractor (T5018)
- Spousal support payments (support agreement)
- Rental property (revenue and expenses, Airbnb, VRBO)
- Business income (revenue and expenses)
- Other employment (tips, stocks)

Deductions & Credits

- Charitable donation receipts
- RRSP Contribution receipts
- Political contributions
- Child care expenses
- Adoption expenses
- Costs to access medical intervention required in order to conceive a child
- First time home buyer
- Moving expenses (if the move was over 40 km to be closer to work)
- Costs to renovate your home to enhance mobility for taxpayers eligible for the Disability Tax Credit, or 65 years of age or older at Dec 31/17
- Investment interest expenses and/or counsel fees
- Union or professional dues
- Spousal support payment
- Caregiver (list dependent)
- Medical expenses
- Student loan interest
- Tuition receipts for students (T2202A) *must retrieve from student account*
- Eligible educator school supplies (receipts up to \$1,000)
- Employment expenses
- Transit passes up to June 2017
- Volunteer firefighter's certification (if spent more than 200 hours volunteering)

Other Documents

- Notice of Assessment (last tax year filed)
- Canada Revenue Agency correspondence
- Disability Tax Credit application (T2201)
- Declaration of Conditions of Employment (T2200)
- Custody arrangement documentation