



Tax Return Checklist

Please provide your most recent income tax return Notice of Assessment from CRA if you have one.

Part A

Names(s): First _____ Last _____

Phone number: Cell _____ Email address: _____

Home Address: _____

Did your address change in the tax year? If so, what is new address? _____

SELL YOUR HOME? Yes No

If you sold your family home, how much did you sell it for? \$ _____

What year did you originally purchase the home you sold? _____

What was address of home you sold? _____

Do you want to change or initiate 'Direct Deposit' with CRA? _____ (include void cheque)

If we don't prepare your spouse's/partner's return what is his/her approx. income? \$ _____

MARITAL STATUS QUESTIONS:

Did your Marital Status change in the tax year? If yes, indicate date changed _____

If yes, did you? Get Married / Become Common Law / Separate / Become a Widow (tick one)

If you separated in the year, living at separate addresses? _____ Since what date? _____

COVID-19 WORK FROM HOME

If you are employed, did you work from home due to COVID in 2021? Yes or No (tick one)

If Yes, for all of 2021? Yes or No (tick one) If not entire year, how many days? _____

If Yes, and you are a renter, please ask for the COVID renter work from home checklist.

Are you a Canadian citizen? Or No If yes, Register for Electors, yes or no (tick one), If NO, status _____

Do you own foreign property worth more than cost of \$100,000? Yes / No (stocks, real estate, etc)

CHILDREN

Did you give birth or adopt a child in the tax year? Yes or No (tick one)? If yes, date

_____ Name (First _____ Last _____)

New Client questions:

Your Birth date _____ Spouse/Partner Birth date _____

Child 1: Name _____ Birth date _____

Child 2: Name _____ Birth date _____

Child 3: Name _____ Birth date _____

Does anyone claim the disability amount? If Yes or No (tick one)

Are any of your children in day care or camps or have childcare? Please provide receipts

If you are separated / divorced, please complete PART B, otherwise go to PART C

Part B (for separated/divorced clients)

Do you have a legal agreement or court order? If Yes or No (tick one) If recent, provide us a copy

Did you receive spousal support? If Yes or No (tick one) If yes then Year total? \$ _____

Did you pay spousal support? If Yes or No (tick one) If yes then Year total? \$ _____

Did you receive child support? If Yes or No (tick one) If yes then Year total? \$ _____

Did you pay child support? If Yes or No (tick one) If yes then Year total? \$ _____

You have primary (more than 60% of the time) or shared custody of your child? Yes or No (tick one)

Do you have an agreement with respect to who is claiming the child for the amount for an Eligible Dependent? If Yes or No (tick one) Please provide us a copy

If you have provided receipts for child care, etc and you did not pay the entire amount and intend to claim less than the receipted amount, please let us know about any arrangements with respect to what % you paid: _____

Part C

Please ensure you have included the following slips or information: (INCOME)

If you have a trading summary and sold stocks during the year, PLEASE request a gains/losses summary from company

All tax slips from employment, investment etc.

Do you or any family members attend post-secondary education? Provide T2202A from

Do any family members have medical expenses? Please provide all receipts! Not a list

HEALTH / DENTAL plan through your employer, how much the premiums you paid? \$ _____

Do you have any charitable donation receipts?

Are you a first-time home buyer? If yes, month home purchased and address _____

Have you made any political contributions?

"Tax Service of the Future"

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