

IDENTIFICATION AND CONTACT INFORMATION:				
Taxpayer 1				
Full Name	SIN		Phone	
SPOUSE INFORMATION (Taxpayer 2)				
Full Name	SIN		Phone	
IF ANY CHANGES OR YOU ARE A NEW CLIENT:				
Current Address				
Marital Status (as of Dec. 31/15)			Date of Change in Marital Status	
Dependent(s):				
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
Birthdate MM/DD/YY	Your citizenship _____ Are you a United States citizen? Yes ___ No ___ Are you a green card holder? Yes ___ No ___ Were you born in the United States? Yes ___ No ___ Were your parents born in the United States? Yes ___ No ___		Email	

1. Please note important tax changes:

- a. If you sold your principal residence, please bring documents regarding the sale, the original purchase price, date the home was bought and sold, and how many years you are claiming the principal residence exception.
- b. The 15% Children's Fitness and Arts tax credit and the Education and Textbook tax credit will be eliminated effective January 1, 2017. For 2016, the Children's Fitness and Arts tax credit is 50% of the previous allowable amounts.
- c. Income splitting for a couple with children under 18 has been eliminated.
- d. Teachers and early childhood educators will be able to purchase \$1,000 of eligible school supplies to be used in the school room and receive a tax credit of 15%.

TAX DOCUMENT CHECKLIST

Before you visit us, please use this handy checklist to ensure you have all the documents your tax professional needs to help maximize your refund.

SLIPS:

- ☐ All T4 slips (Employment Income)
- ☐ Employment Insurance benefits (T4E)
- ☐ Interest, dividends, mutual funds (T3,T5)
- ☐ Registered Retirement Savings Plan income (T4RSP)
- ☐ Retirement Income Fund (T4RIF)
- ☐ Universal Child Care Benefit (RC62)
- ☐ Old Age Security and CPP Benefits (T4A(OAS),T4A(P))
- ☐ Other Pensions and annuities (T4A)
- ☐ Social Assistance payments (T5007)
- ☐ Workers' Compensation benefits (T5007)
- ☐ All other information slips

RECEIPTS:

- ☐ RRSP contribution slip(s) for year *1st 60 days of calendar year
- ☐ Support for a child or spouse (provide copy of post April 30 1997 agreement)
- ☐ Professional or union dues
- ☐ Tuition/education receipts (T2202A)
- ☐ Tool expenses (tradespersons)
- ☐ Medical expenses
- ☐ Transit pass receipts
- ☐ Charitable donations
- ☐ Political contributions
- ☐ Child care expenses
- ☐ Adoption expenses
- ☐ Children's arts and fitness programs
- ☐ Moving expenses
- ☐ Interest paid on student loans
- ☐ Carrying charges and interest expenses
- ☐ Office in home expenses

OTHER DOCUMENTATION:

- ☐ Notice of Assessment/Reassessment for prior year
- ☐ Canada Revenue Agency correspondence
- ☐ Financial Advisor Annual Investment package
- ☐ Sale or deemed sale of stocks, bonds or real estate
- ☐ Other Capital Gains, purchase and sales
- ☐ Rental income and expense records
- ☐ Business and/or farm income/expenses
- ☐ Automobile/travel logbook and expenses
- ☐ Declaration of Conditions of Employment (T2200)
- ☐ Other employment expenses
- ☐ Disability Tax Credit certificate
- ☐ Volunteer Firefighters certification