



INTEGRITY

BUSINESS SERVICES^{LD}

Name:							
Address:							
City:		Prov:		Postal Code:		Phone Number:	
Date of Birth:				SIN:			
Email:							

Marital Status: Single Married Separated Divorced Widowed Common-Law

If your marital status changed, indicate the date of change: _____

Spouse / Dependents:

Name	Date of Birth	Relationship	SIN

Spouse's Name & SIN: _____ **Spouse's Net Income:** _____
(provide only if we are not preparing the return)

Circle Applicable

Do you authorize CRA to Give your Name, Address and D.O.B to Elections Canada for the Register of Electors?	YES
	NO
Are you a Canadian citizen?	YES
	NO
Do you own foreign property worth more than \$100,000 CDN?	YES
	NO
Did you sell your home during the year? Provide the address of home sold, date of when you purchased the home, what your purchase/selling price was.	YES
	NO
Are you a renter? Provide the amount per month, length of rental, your landlord and include the receipt.	YES
	NO
Do you have a disability tax credit on file with CRA (form T2201)	YES
	NO
Are you in bankruptcy? Pre, Current or Post status.	YES
	NO

******PLEASE BRING PRIOR YEAR NOTICE OF (RE)ASSESSMENT******

Before signing this document, verify that the content you are providing and supplying is correct.

Client signature

Date of submission

FLIP THIS PAGE OVER FOR SLIP CHECKLIST.



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Slip Name	Slip Description	Check if slip is attached
T4, T4A	Employment Income, Pension Payments from Employer, Wage Loss Replacement, Scholarship	
T4A (OAS)	Old Age Security	
T4A (P)	Canada Pension Plan	
T4E	Employment Insurance	
T4RSP/T4RIF	Income from a RRSP/RRIF (from a spousal plan?) Yes <input type="checkbox"/> No <input type="checkbox"/>	
T3	Mutual Fund and Other Trusts (Excluding RRSP/RRIF's)	
T5	Interest and Dividends	
T5008	Purchase and Sale of Securities	
T5013	Partnership Income	
T5007	Social Assistance, Worker's Compensation	
RC 62	Universal Child Benefits – for children under 6. Only applicable for 2016 tax year.	
RRSP Contribution	Registered Retirement Savings Plan Contributions (RRSP)	
	Charitable Donations, Political Donations, Professional Dues / Union Dues / Membership Fees	
TL2	Claim for meals and lodging, must be signed by employer and have their business number listed to be a valid document.	
T2200	Employment Expenses – Declaration of Conditions of Employment. Must be signed and provided from the employer to be a valid document.	
T2202/T2202A/TL11	Tuition Fees – must have official receipt. *If transferring from a dependent, must be printed and signed. DO NOT INCLUDE book receipts.	
T5018	Statement of Contract Payments, if applicable.	
Listing of Self-Employment Income and Expense--Include GST Access Code if you want us to file the return.		
Listing of Income and Expenses for Rental Property.		
Particulars Related to Tax Shelters and the Required Forms, including limited partnership investments		
Savings Bonds, Long-Term GIC's		
Carrying Charges and Interest Paid to Earn Income from Investments		
Disposition of Real Property (original cost proceeds on sale, purchase date, sale date, ownership)		
Support Payments or Alimony Payments Paid or Received--Including the Name, Address and SIN of Payor or Recipient.		
Child Care Expenses, Adoption Expenses – include all relevant receipts		
Eligible Moving Expenses – you must have moved to be more than 40 kms closer to work.		
Amount of Medical Expenses Paid Personally--Receipts Required – Including premiums paid personally or by payroll deduction and portion of expenses not covered by medical plan. Also travel medical insurance.		
Property Taxes or Rent Paid in the Year, Including the Number of Months at Each Location, the Address of Each Location and to Whom the Amounts Were Paid		
Amount of Installment Payments Made During the Year		
Cost, Proceeds and Expenses on Disposition (include broker statements/trading slips and quarterly		
Transit Passes + Receipts		
Claim for Caregiver Amount		