

Canadian Accounting Group Inc.

Welcome to the Canadian Accounting Group Inc. Personal Income Tax Checklist form. This form is meant to help you put together your tax information for either submission to our office by fax, smartphone or for our onsite tax appointment.

Please complete all applicable areas and use the checklist on the bottom of page 2 prior to submission to our office. Please note our office will contact you prior to processing your credit card with the results of the return and to confirm the applicable fee. Please note that you will also be required to sign and return the T183 E-File consent form to our office upon receipt.

Tax Year

E-mail

Mr/Ms

Mr

Mrs

Ms

Social Insurance Number
(###-###-###)

First Name

Last Name

Address

City

Country-Province

Postal Code

Date of Birth

Main Phone

Alt Phone

Main Phone is
a Mobile Ph?

Yes

No

Alt Phone is
a Mobile Ph?

Yes

Marital Status
Dec 31st

Date of Marital Change

Disability Tax
Credit?

Social Media - Used for communication and public information

Notes

Spouse Information

E-mail Are you on Facebook
 Linked In
 Google+

Social Ins No

First Name

Last Name

Address

City

Prov

Postal Code

Date of Birth

Main Phone

Alt Phone

Dependents

Dependents include any dependent that live and relies on your care giving including children, parents or grandparents etc. Include any T4, T5 or any other slips

First Name 1

Last Name 1

Date of Birth 1

Social Ins # 1

Net Income 1

Disability Tax Credit 1

Yes

First Name 2

Last Name 2

Date of Birth 2

Social Ins # 2

Net Income 2

Disability Tax Credit 2

Yes

First Name 3

Last Name 3

Date of Birth 3

Social Ins # 3

Net Income 3

Disability Tax Credit 3

Yes

If you have additional dependents please provide the above fields of information for each additional on a separate attached piece of paper.

Income Sources - Attach include the associated slips or provide the information

- Income
- Employment Income (attach T4, T4A slips or details)
 - Pension Income (attach T4AP, T4OAS, T4A, T4RIF slips or details)
 - RRSP withdrawn (attach T4RSP slips or details)
 - Investment Income (attach T3, T5, T600 slips or details)
 - Capital gains/losses (detail of gains or losses) *
 - Rental income/loss (Detailed revenue and expenses by property) *
 - Self employment income/loss (Detailed revenue and expenses) *
 - Farming income/loss (Detailed revenue and expenses) *
 - Fishing income/loss (Detailed revenue and expenses) *
 - Limited partnership income/loss (attach T5018 or details)
 - WCB Income (attach T5008 or details)
 - Foreign income (attach details in foreign currency)
 - Alimony/child support received Amount
 - Other Income Desc/Amount

* Contact our office for specialized forms

Additional Info

Deductions and Tax Credits - Attach slips and/or include amounts

RRSP Contributions (attach RRSP slips)

Professional and Union dues (not on T4). Amount

Charitable Donations (attach receipts) Amount

Medical expenses within year. Amount

Repayment of EI Benefits (attach T4E slips)

Child care expenses. Amount

Education expenses (attach T2202 slips or note online school login below)

Moving expenses *

Employment expenses (expense details & T2200) *

Alimony and/or Tax Deductible Child support paid. Amount

Interest/Investment carrying charges.(provide details)

Disability deduction (attach Form T2201 and mark disability above Page 1-2)

Provincial Tax Credit (Red Seal or other credits include details)

Losses during the year. (attach details)

* Contact our office for specialized forms which are available

Other Info

Additional Tax Info

T1 Personal tax installments paid in tax year. Amount

Losses from previous years. (attach details).

Prior reassessments. (Attach reassessment notices).

Prior T1 Refund interest Amount

Additional Info

Before sending us your tax information (we accept Tax By Fax (visit www.TaxByFax.ca) or Tax by Phone (visit www.TaxByPhone.ca) or before we arrive for our onsite tax appointment that you have booked by calling our office at either 604-463-8202 (local) or 1-800-667-9254 (toll-free) take a moment and make sure you have done the following:

- 1: Enter your personal information
- 2: If applicable, enter your spouses information
- 3: If applicable, enter your dependents information
- 4: Check off sources of income and include slips/info
- 5: Check off deductions/credits and include slips/info
6. If sending by fax, fax to 1-888-315-5688 with your information. Call the office M-F 9am-1pm 604-463-8202 (local) or 1-888-35-5688 (toll-free) to confirm receipt.
7. If sending by phone visit www.TaxByPhone.ca
8. If want an onsite tax appointment call right away at 604-463-8202 (local) or 1-800-667-9254 (toll-free)

Engagement for Services

Term of Engagement accepted in full and without objection. I/We further agree to provide Choquette & Company Accounting Group Incorporated with required electronic signatures as required in order to complete the Personal Income Taxes we have requested.

Per: _____ (Seal)