

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 e-mail to Andre@CanAcct.com, Smartphone (Text to: 604-813-3539), fax (1-888-315-5688), or for your scheduled Mobile Tax appointment

Please complete all applicable areas and use the checklist prior to submission to our office. Please note our office will contact you with the results of the return along with providing you with the tax results by e-mail. Please note that you will also be required to sign and return the T183 E-File consent and our firms engagement 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

Social Media - Used for communication and public information

Disability Tax
Credit?

Notes

Spouse Information

Spouse E-Mail:

Are you on

Social Insurance No

First Name:

Last Name

Address

City:

Prov

Postal Code:

Date of Birth

Mobile Phone No:

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 RRSP withdrawn (attach T4RSP slips or details)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

I/We have read the following Engagement Agreement (Also Available at CanAcct.com/T1Eng)

I/We have approved the above (or those at CanAcct.com/T1Eng) terms of engagement

Before sending us your tax information (by e-mail, smartphone or fax) or before we arrive for your booked mobile office tax appointment please check off the following to make sure you have all your information together:

- 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. Read and Check off both the Read and Approved Engagement CheckBoxes
7. If sending by E-Mail or Smartphone: ,
8. If sending by Fax, send this form along with your tax slips to 1-888-315-5688
9. If want an mobile-office tax appointment call right away at 1-800-667-9254.

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)