

SimpliFiled

BOOKKEEPING & TAX SERVICES

TAX FILING - CLIENT INFO

PRIVATE AND CONFIDENTIAL

Date

CLIENT CONTACT INFORMATION

First & Last Name

(As on file with CRA)

Email Address

Phone Number

Complete Current Address

Including Postal Code

Preferred Contact

☐ Email

☐ Phone

☐ Does Not Matter

DETAILS REQUIRED FOR TAX FILING

S.I.N.

Date of Birth

DD-Month-YYYY

Marital Status

☐ Single

☐ Separated

☐ Divorced

☐ Widowed

☐ Common Law

☐ Married

Spouse's Name & SIN

(If Applicable)

Spouse's Net Income

(If Applicable)

Registered for CRA My Account?

☐ Yes

☐ No

Employment Status

☐ Employed (T4)

☐ Self-Employed / Sub-Contractor

☐ Retired / Unemployed

Do you have dependants?

☐ Yes

☐ No

If yes - please submit their Name, Date of Birth & Net Income

HBP or LLP?

(Home Buyers Plan) (Lifelong Learning Plan)

☐ Yes

☐ No

Do you have a FHSA?

(First Home Savings Account)

☐ Yes

☐ No

Did you file bankruptcy?

☐ Yes

☐ No

Were you in a Prison or Institution?

☐ Yes

☐ No

Do you have any Foreign Property?

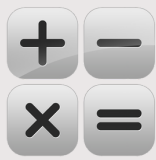
☐ Yes

☐ No

Sale of Principal Residence?

☐ Yes

☐ No



TAX SLIPS AND DOCUMENTS

Review the list below. Submit **all** documents that apply to you

INCOME

T4 - Employment Income
T4E - Employment Insurance
T4A - Pension/Annuity
T4A-RCA - Retirement Compensation Arrangement
T4A - COVID 19 Benefits
T4A(P) - CPP
T4A(OAS) - Old Age Security
T3 - Investment Income
T5 - Investment Income
T5008 - Investment Income
T4007 - Social Assistance
T4RSP - RRSP Income
T4RIF - RIF Income
T5013 - Partnership Income
T5018 - Sub-Contractor Payments
Foreign Income
Alimony or Child Support (Court Ordered)
Rental Income

DEDUCTIONS / CREDITS

T2202 - Tuition
Charitable Donations
RRSP Contributions
Medical Expenses
Childcare Expenses
Union or Professional Dues
Student Loan Interest
Interest Expenses
Moving Expenses
New Home Purchase
Home Accessibility Expenses
Digital News Subscriptions
Adoption Expenses
School Supplies for Teachers
Employment Expenses - with or without form T2200
Examination Fees for Professional Designations
Legal Expenses
Expenses for Rental Property

OTHER DOCUMENTS AND INFORMATION REQUIRED

Select the items relevant to you

- | | |
|--|---|
| ☐ Last Years Notice of Assessment (NOA) | ☐ Disability Tax Credit Certificate |
| ☐ Instalment Payment Notices | ☐ Municipal Property Tax Assessment |
| ☐ Information about your dependants
<small>(Name, Date of Birth, Net Income)</small> | ☐ Rent Receipt |
| ☐ Post Secondary Tuition Credits | ☐ Income & Expense Log (Self-Employed) |
| | ☐ Carry-Forward Amounts (i.e. donations) |

Additional Information/Notes: