

# Personal Tax Checklist

PERSONAL INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Apt./Suite – Building Number Street Name, City, Postal Code			Marital Status
Phone	Email		
Any family members disabled? YES <input type="checkbox"/> NO <input type="checkbox"/>		Are you a Northern Resident? YES <input type="checkbox"/> NO <input type="checkbox"/>	
Did your marital status change during the year? YES <input type="checkbox"/> NO <input type="checkbox"/> If "YES", please provide date ____/____/____		Are we preparing a tax return for your spouse? YES <input type="checkbox"/> NO <input type="checkbox"/>	
Do you authorize CRA to provide information about you to Elections Canada? YES <input type="checkbox"/> NO <input type="checkbox"/>			
SPOUSE INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Phone	Email		
Do you authorize CRA to provide information about you to Elections Canada? YES <input type="checkbox"/> NO <input type="checkbox"/>			
If you have selected "No" above for the preparation of your spouse's tax return, please provide the following: Net income figure of his/her tax return: _____			
CHILDREN INFORMATION			
Full Name – Child 1	S.I.N.	Birthdate	Citizenship
Are we filing their personal tax return? YES <input type="checkbox"/> NO <input type="checkbox"/>			
Full Name – Child 2	S.I.N.	Birthdate	Citizenship
Are we filing their personal tax return? YES <input type="checkbox"/> NO <input type="checkbox"/>			
Full Name – Child 3	S.I.N.	Birthdate	Citizenship
Are we filing their personal tax return? YES <input type="checkbox"/> NO <input type="checkbox"/>			
SALE OF PRINCIPAL RESIDENCE			
Did you sell your primary residence during the year? YES <input type="checkbox"/> NO <input type="checkbox"/>			
If Yes, please provide us with the Year of Acquisition of your principal residence and your proceeds of disposition. Year of Acquisition: _____ Proceeds of Disposition: _____			
FOREIGN REPORTING			
Do you own foreign assets with a cost greater than \$100,000? YES <input type="checkbox"/> NO <input type="checkbox"/> Spouse: YES <input type="checkbox"/> NO <input type="checkbox"/>			
Please provide details of ownership of foreign assets and transactions with foreign entities. Please note that PENALTIES ARE APPLICABLE if not reported.			
DIRECT DEPOSIT/ TAX REFUND			
Do you want your tax refund deposited directly to your bank account? YES <input type="checkbox"/> (Please attach a void cheque)      Direct Deposit already requested last year <input type="checkbox"/> NO <input type="checkbox"/> Same account for spouse? YES <input type="checkbox"/> NO <input type="checkbox"/>			
TAX RETURN DELIVERY METHOD			
How do you want your tax return delivered once it has been completed by our staff? <b>Note there is a \$5 printing fee per person, per taxation year.</b> Electronic copy sent to my email above <input type="checkbox"/> Mail to my Home Address <input type="checkbox"/> Hold for Pick-up <input type="checkbox"/> All returns sent to the same email? YES <input type="checkbox"/> NO <input type="checkbox"/> Email to use _____			