



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 (DEPENDANT) 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 ("PR")			
Did you sell your primary residence during the year? YES <input type="checkbox"/> NO <input type="checkbox"/>			
If Yes, please provide us the following: Year of Acquisition: _____ Proceeds of Disposition: _____ Claim all years as PR? YES / NO			
FOREIGN REPORTING			
Did you own foreign assets with a cost greater than \$100,000 in the year?		YES <input type="checkbox"/> NO <input type="checkbox"/>	Spouse: YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you own in interest in a foreign affiliate at any time in the year?		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.			
TAX RETURN DELIVERY METHOD			
How do you want your tax return delivered once it has been completed by our staff? Note there is a \$5 printing fee per person, per taxation year.			
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 _____	