

Client Name: _____

Phone: _____

Spouse/Dep: _____

Email: _____

Email: _____

MOST COMMON INCOME ITEMS:

- All current year Tax Slips (T3's, T4's, T4a Pensions, T4a CPP & OAS, T4RRSP's, T4RIF's, T5's, T5008's etc)
- Self Employment income and expenses (if applicable) (Please complete and attach T2125 Worksheet)
- Rental income and expenses (if applicable) (Please complete and attach T776 Rental Worksheet)
- Details of Capital Gains / Realized Capital Losses (including Investment Advisor worksheets and expenses)

- Do you think there could be missing slips or other income to the best of your knowledge? Y / N

DEDUCTIONS AND CREDITS:

- RRSP receipts for balance of current tax year being reported, plus 1st 60 days of the following year;
- Allowable Medical receipts (Doctor, Dentist, Optometrist, Naturopath, Prescriptions, etc.)
- Donation receipts for gifts to registered Canadian charities; Digital Media subscription receipts
- Employment expenses and # Days Working from Home/amounts (Complete T2125 Worksheet and attach T2200)
- Other items: Tuition/Education receipts (T2202a), Child Care, Union Dues, Support Payments etc.

- Are there any other items you think we should discuss? Y / N _____

OTHER ITEMS:

Copy of the Last Tax Return filed with the CRA (Required for **All New Clients**)

New Address, Phone Number and/or Email (If you are a returning client and there are **changes**)

**** NEW: BARE TRUST** information and details if applicable (for **next generational assets** held in trust)

And any other potential information unique and specific to your personal tax situation
