



Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ SIN #: \_\_\_\_\_  
Spouse Name: \_\_\_\_\_ (include common-law spouse)  
Date of Birth: \_\_\_\_\_ SIN #: \_\_\_\_\_  
Date of marriage (if this year) \_\_\_\_\_ Date of separation or divorce (if this year) \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
Cell: \_\_\_\_\_ E-Mail: \_\_\_\_\_

*(Please circle the best way(s) to contact you)*

**Dependant Children Information**

Children's Names	Date of Birth	SIN #

**Note that world wide income must be reported on your Canadian income tax return.**

1. Number of days in USA in 2018 \_\_\_\_ 2016 \_\_\_\_ 2017 \_\_\_\_ (If less than 3 weeks ignore this)

Are you a *U.S. citizen, Green Card Holder*, or were you, or your parents *born in the United States*?  
You likely have U.S. filing obligations. US Citizen **Y/N**

2. If you **DO NOT** wish your name and address to be forwarded to Elections Canada check here

3. Did you sell any type of real estate in 2018, including principal residence? **Y/N**

4. I had more than \$100,000 of foreign assets (cash, investments, real estate (rental only), shares of foreign companies and other foreign securities **AT ANY TIME** in the year)  
**Y/N**

**Please note that this includes US stocks and bonds held in Canadian broker accounts**

5. Date became or ceased to be resident of Canada: \_\_\_\_ CDN Citizen **Y/N**

6. Do you require us to prepare a GST return for you? **Y/N**

#404 Willow Park Centre  
10325 Bonaventure Drive SE  
Calgary, AB T2J 7E4  
P 403-252-5858 F 403-259-8416  
[www.partnersinprosperity.ca](http://www.partnersinprosperity.ca)  
[admin@partnersinprosperity.ca](mailto:admin@partnersinprosperity.ca)



## PERSONAL TAX RETURN CHECKLIST

### INCOME

*Check if Applicable*

1. Salary T4 / T4PS
2. OAS Pension T4A(OAS)
3. CPP Pension T4A(P)
4. Other pensions T4A
5. Business income  
Schedule and attached T2125
6. EI Benefits T4E
7. Universal Child  
Care Benefit RC62
8. Interest/dividends T5 or T3
9. Capital gains and losses T3 or  
schedule
10. RRSP/RRIF T4RSP/T4RIF
11. Rental income Schedule T776
12. Alimony Schedule
13. Foreign pension Statement
14. Foreign income Statement
15. Partnership income T5013 or Stmt
16. Scholarships T4A

**(If you receive any slips after your T1 has been filed please inform us)**

### DEDUCTION

*Check if Applicable*

1. RRSP deduction receipts
2. Professional dues
3. Child care (Need SIN# if  
Individual)
4. Moving expenses (if moving >  
40km for employment)
5. Alimony **(in first year need  
spouse's SIN and copy of legal  
agreement)**
6. Carrying charges (includes  
accounting fees, investment counsel  
fees and interest on investment

loans)

7. Medical expenses not reimbursed  
(includes private insurance and  
travel premiums)
8. Charitable and political donations
9. Tuition fees (if transferring to other  
family member have student sign  
back of T2202)
10. Statement of interest on student  
loans
11. Statement of instalments paid
12. Tax shelters T101, T5013, T5003
13. If employed and eligible to deduct  
expenses, schedule of expenses  
and T2200
14. For proprietors or partners a  
schedule of revenue and expenses,  
business and personal mileage and  
home office expenses
15. First Time Home Buyer's tax credit  
Let us know if you are a first time  
home buyer
16. Home accessibility expenditures  
receipts
17. Lawyers records of sale of any real  
estate and purchase date and cost.

**Note that worldwide income must be reported on your Canadian tax return.**

***Please supply us with a copy of your 2017 Notice(s) of Assessment if we did not prepare your 2017 income tax return.***

**Your return will only be Efiled on receipt of the signed T183 form authorizing us to transmit the return.**

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