



CONFIRMING THIS INFORMATION AND ANSWERING THE ENCLOSED QUESTIONS IS IMPORTANT TO COMPLETING AN ACCURATE T1 RETURN

**NAME:**

**ADDRESS:**

**PHONE (HOME):**

**WORK:**

**CELL:**

**EMAIL:**

EMAIL ADDRESS FOR CLIENT COMMUNICATIONS ONLY. NOT PROVIDED TO CRA UNLESS REQUESTED BY CLIENT

**PROVINCE OF RESIDENCE ON DECEMBER 31, 2017:**

**MARITAL STATUS:** (IF CHANGED GIVE DETAILS INCLUDING DATE OF CHANGE)

**IF YOU ARE MARRIED OR COMMON-LAW AND WE ARE NOT PREPARING YOUR SPOUSE'S TAX RETURN**  
**PLEASE PROVIDE ESTIMATE OF THEIR NET INCOME: \$**

**DEPENDANT INFORMATION** (includes children or other family members residing with you but **NOT SPOUSE**):

<b><u>NAME</u></b>	<b><u>DATE OF BIRTH</u></b>	<b><u>SIN</u></b>	<b><u>NET INCOME</u></b>
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**PREFERRED OPTION WHEN PICKING UP TAX RETURN:**

- Sign off on return at office for filing
- Brief meeting with Walter (maximum 15 minutes) to review return\*\*

\*\* Meeting availability will be limited or restricted at certain times of the year and depending on circumstances of the applicable tax return

**SPECIAL INCOME TAX ISSUES WHICH MAY AFFECT YOUR RETURN:**

These are general reminders based on some of your past income tax inclusions. They may or may not apply. Feel free to make any additional notes of your own for us to consider when preparing your return.

**Additional Information (absence of answers may be presumed negative)**

Do you support, in any way, extended members of your family due to health or other Extraordinary circumstances?	Yes	No
Did you pay or receive child and/or spousal support payments? * (detailed information required. Check with our office for details)	Yes	No
Has there been any ongoing change in medical conditions in 2017? (If yes please provide details on separate paper)	Yes	No
Did you pay rent or property taxes in 2017? *	Yes	No
Did you receive the Ontario Property Tax Grant for seniors in 2017?	Yes	No
Did you pay for qualifying transit passes from January to June 2017? *	Yes	No
Were you a student residing in college or university residence during 2017?	Yes	No
Did you attend college or university in 2017?	Yes	No
Do you have any outstanding student loans (student lines of credit don't apply)? *	Yes	No
Do you own foreign holdings/property with a cost of \$100,000 or more? (excludes recreation properties where no income is earned) *	Yes	No
Do you have any incomes (foreign or domestic) for which no tax information slip is available? (includes investments, foreign pensions, self-employment, etc.) *	Yes	No
If you are a senior (65 years or more) or reside with a senior did you incur any expenditures improving accessibility in your residence *	Yes	No
Did you make instalments to your CRA income tax account in 2017? * (Does not include income taxes withheld at source on incomes and reported on a tax slip)	Yes	No
Did you sell or were you deemed to have sold your principal residence in 2017? * (Information on sale price, original purchase year, and other information may be needed – contact our office)	Yes	No

**\* You should provide documentation on this item or we may not be able to make applicable claims**

I agree this information accurately reflects my personal information and status for purposes of preparing my 2017 Income Tax & Benefit Return.

\_\_\_\_\_  
Taxpayer Signature

**BSA Staff Reviewed:**

**Client Code:**

**DOD:**

**PERSONAL AND CONFIDENTIAL**