



New TAX YEAR _____

Returning S.I.N. _____

No changes D.O. Birth _____

Marital Status _____

NAME _____ Children / D.O.B. _____

ADDRESS _____

On file _____

HOME PHONE _____ BUSINESS PHONE _____

EMAIL _____ DATE RECEIVED _____ BY _____

PERSONAL INCOME TAX KIT

- Prior year(s) notice of assessment
- Employment income (T4)
- OAS, CPP, other pensions (T4A, T4RSP, T4RIF)
- Interest, dividends, other (T3, T5, T5013)
- Unemployment Insurance benefits (T4E)
- WSIB, Social Assistance benefits (T5007)
- List of other income or investments sold
- List of foreign property owned
- Rental, business or farm income/expenses
- Automobile and travel expenses
- Home office expenses
- Business assets purchased/sold
- Medical expense receipts
- Education receipts, student loan statement
- Charitable or political donation receipts
- Professional and union dues paid
- RRSP contributions
- Alimony or separation paid/received
- Child care expenses
- Moving expenses/Home Buyers credit
- Carrying charges, interest
- Property taxes and rent paid
- Other _____
- Other _____

NOTES: _____

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