

Returning Personal Tax Client Information

Name: _____ Date: _____
Phone: _____ Cell: _____
Email: _____

- Were you a resident of Alberta on December 31, 2019? Yes [] No []
• Did your marital status change? No [] Yes [] If yes, when: _____
How? _____

If you got married last year please provide the following information for your spouse:

Name: _____ S.I.N.: _____

Date of Birth: _____

Is your spouse also filing a return with us? Yes [] No []
If no, what is your spouse's net income? _____

- Was there a change to any dependants? (children born or adopted) Yes [] No []
Name: _____ Gender: _____ Date of Birth: _____ Income: _____
Name: _____ Gender: _____ Date of Birth: _____ Income: _____

- ** Did you sell ANY real estate properties in 2019? Yes [] No []
(including sale of your principal residence or change of use)
• Are you disabled or are any of your dependents disabled? Yes [] No []
If yes, has a T2201 Disability Tax Credit Request been filed with CRA? Yes [] No []
• Did you receive interest, dividends or benefits from a business in which a relative is a key party in terms
of ownership or involvement)? Yes [] No []
• Are you the caregiver for any infirm family members? Yes [] No []
• Did you incur costs to access medical intervention to conceive a child which was not allowed previously as a
medical expense? Amounts may now be claimed for the previous 10 years. Yes [] No []
• Did you provide in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an
infirm dependant relative? Yes [] No []
• Were you a first-time home buyer in 2019? Yes [] No []
• Are you a teacher? If so, can you provide receipts up to \$1000 for school supplies purchased?
Yes [] No []
• Have you organized or managed a crowdfunding campaign? Yes [] No []
• Did you receive a retroactive lump-sum payment over \$3,000 (for example, spousal support)?
In certain cases, some tax relief may be granted. Yes [] No []
• Do you qualify for northern residents deductions? Yes [] No []
You must have lived, on a permanent basis, in a prescribed northern or intermediate zone for a continuous period of
at least six consecutive months.

Should we have any questions when we are preparing your tax return, we will contact you. We appreciate your quick response and thank you for your co-operation.

To help you gather your information for preparation of your T1 Personal Tax Return, we have prepared the following list of possible information that should be provided to us

Information slips:		
T3	Trust Income	<input type="checkbox"/>
T4	Employment Income	<input type="checkbox"/>
T4A(OAS)	Old Age Security	<input type="checkbox"/>
T4A(P)	Canada Pension Plan	<input type="checkbox"/>
T4A	Other Pensions/Self-Employed Commissions	<input type="checkbox"/>
T4E	Employment Insurance & Other Benefits	<input type="checkbox"/>
T4PS	Employee Profit Sharing Plan	<input type="checkbox"/>
T4RIF	Income from Retirement Income Fund	<input type="checkbox"/>
T4RSP	Income from Retirement Savings Plan	<input type="checkbox"/>
T5	Investment Income	<input type="checkbox"/>
T10	Pension Adjustment Reversal	<input type="checkbox"/>
T101	Resource Expenses	<input type="checkbox"/>
T5003	Tax Shelter Information	<input type="checkbox"/>
T5007	Benefits	<input type="checkbox"/>
T5008	Securities Transactions	<input type="checkbox"/>
T5013	Partnership Income	<input type="checkbox"/>
T5018	Contractor Payments	<input type="checkbox"/>
RC62	Canada Child Benefit (CCB)	<input type="checkbox"/>

Details and receipts for:		
• Registered Retirement Savings Plan (RRSP) contributions	<input type="checkbox"/>	
• RRSP – Home Buyer’s Plan repayments	<input type="checkbox"/>	
• RRSP – Lifelong Learning Plan repayments	<input type="checkbox"/>	
• Registered Education Savings Plan (RESP) withdrawals	<input type="checkbox"/>	
• professional and union dues	<input type="checkbox"/>	
• charitable donations	<input type="checkbox"/>	
• tuition fees for both full-time and part-time courses for you or a dependant – Forms T2202, TL11A, B, C and D where applicable	<input type="checkbox"/>	
• medical expenses for you and dependant(s) including travel expenses, medical premiums	<input type="checkbox"/>	
• political contributions	<input type="checkbox"/>	
• interest paid on qualifying student loans	<input type="checkbox"/>	
• moving expenses, including costs of maintaining a vacant former residence	<input type="checkbox"/>	
• home accessibility renovation receipts	<input type="checkbox"/>	
• childcare expenses	<input type="checkbox"/>	

Rental property income/expense & Capital Purchases	<input type="checkbox"/>
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Details and receipts for Business/Farming/Professional Income/Expense:	
• revenue & expenses	<input type="checkbox"/>
• capital purchases (vehicle, equipment, etc.)	<input type="checkbox"/>
• home office expenses	<input type="checkbox"/>
• vehicle expenses including business mileage	<input type="checkbox"/>
Do you have Internet Business Activities? Include any activity where you earn income from your webpages or websites.	<input type="checkbox"/>

Details of other income/expense, such as:	
• capital gains and losses realized in 2019 (This information may be obtained from your investment advisor.)	<input type="checkbox"/>
• alimony, separation allowances, child maintenance (including divorce agreement and support amount that was paid) Income <input type="checkbox"/> Expense <input type="checkbox"/>	<input type="checkbox"/>
• pensions (certain pension income may be split between spouses). Foreign pension income has special rules.	<input type="checkbox"/>
• other investment income, including Bitcoin	<input type="checkbox"/>
• tips, prizes, awards received	<input type="checkbox"/>
• interest on money borrowed to purchase investments	<input type="checkbox"/>
• investment counsel fees	<input type="checkbox"/>
• accounting, legal and other professional fees	<input type="checkbox"/>
• other employment income (including stock option plans and Election Form T1212)	<input type="checkbox"/>
• director fees	<input type="checkbox"/>
• scholarships, fellowships, bursaries	<input type="checkbox"/>
• adoption related expenses	<input type="checkbox"/>
• clergy residence deduction information, including Form T1223	<input type="checkbox"/>
• disability supports expenses (speech, sight, hearing, learning aids for impaired individuals and attendant care expenses)	<input type="checkbox"/>

Employment Expenses	
• employment related expenses – provide a T2200 – Declarations of Conditions of Employment (signed by employer)	<input type="checkbox"/>
• tools acquired by tradespersons and eligible apprentice mechanics	<input type="checkbox"/>
• capital purchases (vehicle, equipment, etc.)	<input type="checkbox"/>
• home office expenses	<input type="checkbox"/>
• vehicle expenses including employment mileage	<input type="checkbox"/>