

Client Information

First Name: _____

Last Name: _____

Date of Birth (mm/dd/yyyy) _____

Address: Street _____

City _____

Postal Code _____

Phone Number: (____) _____ - _____

E-Mail: _____

Canadian Citizen (circle): YES / NO

Marital Status (circle): Married / Living Common-Law / Widowed
Divorced / Separated / Single

If status changed during the tax year, indicate
month and day: ____/____

Spouse Information (if applicable):

First Name: _____

Last Name: _____

Date of Birth (mm/dd/yyyy) _____

SIN (if applicable) _____ - _____ - _____

Line 236 of Tax Return \$ _____

(if already prepared)

Child 1:

First Name: _____

Last Name: _____

Date of Birth (mm/dd/yyyy) _____

SIN (if applicable) _____ - _____ - _____

Child 2:

First Name: _____

Last Name: _____

Date of Birth (mm/dd/yyyy) _____

SIN (if applicable) _____ - _____ - _____

New Clients

It is very beneficial if you have your prior year's Notice of Assessment and/or Tax Return to help prepare your taxes. If you have misplaced your Notice of Assessment, you can have a copy sent to you by calling Canada Revenue at (800) 959-8281. If you cannot find your prior year's tax return, try contacting the person or agency who prepared your last tax return.

www.jbaccountingservices.ca

Phone (905) 252-3887

Fax (905) 535-3837

info@jbaccountingservices.ca

SLIPS AND FORMS CHECKLIST

Income slips:

- T3 Investment & Trust Income
- T4 Employment Income
- T4A Pension Income; Taxable Benefits; Wage-Loss Replacement; Retiring Allowances; Scholarships & Research Grants
- T4A(P) Canada Pension Plan Income
- T4A(OAS) Old Age Security Benefits
- T4RSP RRSP Income, First-Time Homebuyer's Withdrawals
- T5 Investment Slips; Interest Income; Common and Preferred Share Dividends
- T5007 Social Assistance and Worker's Compensation Benefits
- RC62 Universal Child Care Benefits

Deductions & Credits:

- Child Care Expenses Receipts
- Employment Expenses; combination of summarized employment expenses, receipts and signed T2200 from employer
- Summary of Interest on Investment Loans (line of credit statements)
- Safety Deposit Box Fees, prior year's accounting carrying charges and fees
- Public Transit Passes
- Rent or Property Tax Receipts
- RRSP Receipts
- Union Dues / Professional Fee Receipts
- Charitable Donation Receipts
- Children's Fitness Credit Receipts
- Interest on Student Loans (issued by National student Loans Service centre or applicable CIBC loans)
- Disability Tax Credit (official CRA Document)
- Medical Expenses Receipts
- Tuition Receipt - (T2202A)

www.jbaccountingservices.ca

Phone (905) 252-3887

Fax (905) 535-3837

info@jbaccountingservices.ca