

T1 Personal Tax Return

To help you assemble your financial information for the preparation of your personal income tax return, please keep this checklist handy. The checklist should be completed and returned to us together with the financial information assembled.



Personal Information	Spouse Information (If Applicable)
Name: _____	Name of Spouse: _____
SIN Number: _____	SIN Number: _____
Date of Birth ____/____/____ (MM/DD/YY)	Date of Birth ____/____/____ (MM/DD/YY)
Home Phone #: _____	Home Phone #: _____
Cell Phone #: _____	Cell Phone #: _____
E-mail: _____	E-mail: _____
Address: _____	Address: _____
City: _____	City: _____
Province/State: _____ Postal Code: _____	Province/State: _____ Postal Code: _____
Country: _____	Country: _____
Did you: <input type="radio"/> Emigrate from Canada <input type="radio"/> Immigrate to Canada <input type="radio"/> N/A	Did you: <input type="radio"/> Emigrate from Canada <input type="radio"/> Immigrate to Canada <input type="radio"/> N/A
<i>Emigration date:</i> ____/____/____ MM DD YY	<i>Immigration date:</i> ____/____/____ MM DD YY

Marital Status: Single Married Common-Law Separated Divorced Widowed

Did your marital status change from last year's tax return? Yes *Date status changed:* ____/____/____ No
 MM DD YY

Are we preparing a tax return for your spouse? Yes No N/A

If we are **NOT** preparing a tax return for your spouse, please provide: *Income figure from Line 236 on page 3* \$ _____

Please list all dependants below:

<u>Name</u>	<u>Relationship</u>	<u>Birthday (MM/DD/YY)</u>	<u>SIN #</u>	<u>Net Income of Previous Year</u>
_____	_____	____/____/____	_____	\$ _____
_____	_____	____/____/____	_____	\$ _____
_____	_____	____/____/____	_____	\$ _____
_____	_____	____/____/____	_____	\$ _____
_____	_____	____/____/____	_____	\$ _____

Do you, your spouse or any of your dependants qualify for the Disability Tax Credit? Yes No

If yes, please indicate whom: _____

Please provide the following documents:

1. Latest Notice of Assessment
2. Last year's tax return **OR** a copy of the last return you filed