



1. Basic information

Your Name: _____ Phone number: _____

E-mail: _____

Do we have your correct/updated information?

I am a returning client. No changes to information for me or my family. Some info has changed. New info below.

I am a new client. Information below.

	Full Name	SIN (NB. Do not email, please call our office)	Date of Birth (mm/dd/yyyy)	Marital Status (Date of change?)
You				
Spouse/Partner				
Dependent 1				
Dependent 2				
Dependent 3				
Dependent 4				

I've moved, current address: _____
(NB. Please check section 9)

Somebody has passed away:

Who? _____ Date of death _____

Please provide a copy of the death certificate, and a full copy of the last will and testament. Also see Section 3.

2. Your preferences - Please check 1 box per question

We're trying to save paper - so we're issuing returns as PDF by default.

- Fine by me.
- I'd like a paper copy too, please

Government of Canada is moving towards direct deposit for paying tax refunds (also quicker).

- I am already set up for direct deposit.
- I want to set it up for this year - form attached (*see our website for form link*).
- I never get a refund / Still prefer a cheque.

Canada Revenue is moving towards e-communication rather than paper.

- I am already set up.
- I want to set it up for this year - please use email address above.
- I prefer paper.

Hawkins & Co sends out a client survey to their personal tax clients each year (max. 5 minutes).

- Happy to take part - use email above.
- No thanks.



3. Correspondence with CRA

- I am a returning client - you have access to my online record.
- I am a new client.
 - Please bring a full copy of last year's tax return. IMPORTANT - this includes full 2125 if self-employed)
 - If not already done, we will ask you to complete form T1013, to give us access. [Note: For deceased taxpayers, the T1013 Form must signed by ALL executors named in the will]

4. Country of citizenship/residence/work

If any changes in your citizenship/residency, please write details on page 6.

	Applicable	Y/N	If YES, which family member?
Are you a Canadian citizen?			
If Cdn, do you authorize CRA to provide your details to Elections Canada?			
Are you a US citizen? <i>If "Yes", you need to file a US 1040 by April 15. Please contact us.</i>			
Do you work in the US? <i>If "Yes", you need to file a US 1040NR by April 15. Please contact us.</i>			
Did you spend >31 days in the US last year? <i>If "Yes", you may need to file a US 1040NR by April 15. Please contact us.</i>			
Do you own any "specified foreign property" with cost >\$100,000? <i>Important - please see definition on page 6 before answering "no".</i>			
If you answered "yes", have there been any changes to the information?			
If you answered "yes" to previous question, please provide information on page 6. (Location, date of purchase/sale, cost/proceeds)			



FOR EVERYONE

5. Income (indicate as applicable)

IMPORTANT: CRA assesses penalties for failing to report income. Please call if you want to confirm which slips you reported last year. Rental, business or professional income - see separate worksheets.

COMMON

Name of slip	Source of income	Applicable	Y/N	If YES, which family member?
T3	Statement of Trust Income			
T4	Statement of Remuneration			
T4A	Statement of Pension, Retirement, Annuity, Other			
T4A(OAS)	Old Age Security Pension			
T4A(P)	Canada / Quebec Pension Plan benefits			
T4E	EI Benefits			
T4RIF	Benefits from a Registered Retirement Income Fund			
T4RSP	Benefits from a Registered Retirement Savings Plan			
T5	Statement of Investment Income			
T5008	Statement of Securities Transactions			

LESS COMMON

Name of slip	Source of income	Applicable	Y/N	If YES, which family member?
T4PS	Statement of Profit Sharing			
T5007	Statement of Benefits			
T5013	Statement of Partnership Income			
T5018	Statement of Contract Payments			
T600	Interest on Bonds			
Lump sums	OAS (form 1198), CPP, QPP			
No slips	Foreign pension income, director's fees, etc.			

If you have another source of income which isn't captured by the above, and you're not sure whether or not you have to report it, please describe below, so we can confirm correct treatment:

6. Alimony / Spousal Support payments

Please provide copy of any new / revised agreements that came into force during year. Spousal support is taxable/deductible in certain circumstances. Child Support is not.

	Total Amount	Name of Payer/ee	SIN of payer/ee
<input type="checkbox"/> Received			
<input type="checkbox"/> Paid			



7. Deductions and Tax Credits

Please attach receipts / slips / schedules for the following items. See "Alert" on page 6.

Please include AMOUNTS PAID DURING YEAR. Provide all supporting receipts. If no receipt, please advise to who paid.

	Applicable	Y/N	If YES, which family member?
RRSP Contribution Receipts			
Childcare deductions (include camp, after- school, daycare, nanny)			
Interest paid on loans to purchase investments / Finance your company			
Investment counsel fees (excluding RRSP fees)			
Professional fees and dues (unless included on slips)			
Employment expenses (ask us if you are eligible - MUST have a signed T2200) - See alert section			
Moving expenses (if you moved 40km closer to workplace - complex rules, ask us)			
Legal fees: - Collection / revision of support payments			
- Related to severance payments			
- Related to appeal a tax assessment			
Charitable Donations (please include summary and total)			
Medical Receipts (please include summary and total)			
Political Donations			
Rent paid			
Property taxes paid			
Public transit passes			
Ontario Healthy Homes Renovation Credit (for seniors - can claim up to \$10,000 in eligible costs)			
Home Accessibility credit (can claim up to \$10,000 in eligible costs)			
Teacher / ECE school supply credit (can claim up to \$1,000 in eligible costs)			

Please tell us if you or a family member served as a volunteer firefighter. Y N If so, was it for > 200 Hours? or < 200 Hours?

8. Disability deduction for any family member

Dependents include children, parents, grandparents, siblings. (Form T929 and/or T2201).

To be claimed for: _____

First year: Y N (If yes, need form T929)



FOR EVERYONE

9. Investments and properties

Enclosed? N/A

Listing / summary of all investment purchases and sales

Broker's summary of account transactions for the year

Security Buy & Sell vouchers

	Applicable	Y/N	If YES, which family member?
Do you hold a Tax-Free Savings Account (TFSA)?			

10. Principal private residence ("PPR")

You still pay no tax on the sale of your PPR - but must report it on your tax return. There may be some taxes if you lived elsewhere or rented out some/all of your home while you owned it - PLEASE CALL

Address of property _____ Date sold _____

Year of purchase _____ Sales proceeds (before costs) \$ _____

Did you buy your first home this year (or buy again after renting for > 4 years)? If so, please call our office, as you may be eligible for First Time Home Buyers Tax Credit (worth \$750)

11. Students

Tuition fees paid (T2202/T2202A required - Student MUST sign back of slip to transfer)

Student loan interest paid

Bursaries / scholarships received (include T4A slips)

Please provide below any additional information you feel is relevant:



ALERT - Some things to be aware of:

Deadlines and penalties

- US returns (1040, 1050NR) are due by April 15.
- Canadian T1 returns are due by April 30. It is extended to June 15 if you (or your spouse) are self-employed. Potential extension if taxpayer passed away later in year.
- HST filings for a Sole Proprietor, due June 15. For Partnership due March 31.
- Any taxes payable are due by April 30. CRA charges interest on amounts due after this date (even if self-employed).
- Late-filing a tax return - penalties are calculated as a %age of outstanding taxes.
- Late-filing an information slip (due with tax returns in some cases) - fixed penalty. **CAN BE SIGNIFICANT.**

Donations

- Must be to a REGISTERED charity to be deductible (issues you a formal receipt showing a charity number).
- Donations to a US charity can only be deducted against US income.

Medical expenses - ELIGIBLE:

- Amount claimed must be your "out of pocket" (co-pay) - reduce for any reimbursements or amounts covered by plan.
- Travel expenses for prescribed treatment >40km from your home (most reasonable expenses, some restrictions).
- Insurance premiums for private health and dental care plans, including health coverage while travelling.
- Nursing home / attendant care - may be deductible if family member is eligible for disability tax credit.
- Cosmetic surgery IF necessary for medical or reconstructive surgery.
- Prescriptions.

Medical expenses - NOT ELIGIBLE:

- Vitamins, supplements, non-prescription drugs.
- Cosmetic surgery IF PURELY COSMETIC, NO MEDICAL / CLINICAL REASON.
- Medical practitioners and services NOT ELIGIBLE IN ONTARIO: acupuncture, psychotherapist, nutritionist, social worker, traditional Chinese medicine practitioner.

Employment expenses

- Normally, you cannot deduct expenses you incur as a consequence of your employment.
- You may deduct certain expenses if your employer requires you incur them, and does not fully reimburse you. You may also be able to reclaim some HST.
- If so, your employer must complete and sign a T2200 form (please call if you need a copy). Use our "Self-Employment" schedule to itemize the expenses.

Specified foreign property

- If you own an income-generating asset outside Canada, you MUST report any revenue you earned from it.
- If you own such an asset, with original cost >C\$100k, you must file a T1135 information slip with your tax return.
- There are **significant** penalties for failing to report such an asset - even if it generated no income.
- Such assets include investments, bank accounts and rental properties outside Canada.
- They do NOT include personal use property (eg. vacation home) that generates no income, or assets used in a business.
- PLEASE ASK US if you have any questions or are not certain.

ADDITIONAL WORKSHEETS:

Please see the additional attachments on our website, if these apply to you:

- Self-employment income (business, professional)
- Business use of home - expenses
- Business use of automobile - expenses
- Rental income

Don't forget to send your supporting documents and please do not email this form unless it is password protected.