

Hello, I am happy to work with you on your taxes. At the end of the page, there are instructions to password protect the document if you choose.

Client legal Name(s) Include middle name:	
Tax Year you require to be completed:	
If this is your first year with me Social Insurance Number:	
Birthdate:	
Address:	
Have you moved since doing your taxes last year?	
Have you sold all or are considered to have sold your principal residence in the last year? <i>High penalty for not declaring this.</i>	
Martial Status:	
Did your marital status change during the time we are completing your taxes for? If so, what date?	
Did your family status change? (marriage/separation/more children)	
If your martial status has changed, have you notified CRA?	
Parents/Child caregivers: <i>Please provide full name, birthdate, and SIN of each child</i>	
Do you have any childcare costs? (Daycare, camps, nanny?) Please provide SIN for any caregivers	
Is this a pre-bankrupt return?	
Do you own foreign property at anytime in the tax year of more than \$100,000 CAD?	
Did you have any income that is exempt under the Indian Act?	
Are you a Canadian citizen?	

As a Canadian citizen, do you authorize CRA to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors??	
Did you cash in any RRSP's?	
Do you have any Home Buyers Plan or Life Long Learning repayments?	
Do you have any tuition credits to claim?	
Did you pay interest on your student loans?	
Do you make any donations?	
Did you contribute Political Contributions?	
Do you have any medical expenses? <i>This includes health benefit plans, Travel insurance, Dental, Physio, Prescriptions, Naturopaths, Osteopaths, medical equipment but does not include massage or vitamins.</i>	
Did you buy a rental property?	
Are there any other monies that you collected during the year? <i>(examples small business, executor fees, rental units, AIRBNB)?</i>	
Did you receive any Grants?	
Do you have investments?	
Did you work from a home office in 2020 due to the COVID-19 pandemic?	
Do you normally write-off your home office pre-pandemic?	
If not, how many days did you work from home?	
Did you apply for EI, CERB, CRB or any other Pandemic related assistance?	
If so, which ones?	

I agree that I am engaging Laurel Williamson to complete my taxes for the tax year(s) _____

Signature (Electronic signature allowed) _____

Add a password to a PDF

1. Open the **PDF** in Acrobat DC.
2. Choose File > **Protect** Using Password. Alternatively, you can choose Tools > **Protect** > **Protect** Using Password.
3. Select if you want to set the password for Viewing or Editing the **PDF**.
4. Type and retype your password. ...
5. Click Apply.

Please use this checklist (some items may not be applicable to your taxes) to ensure you provide us with all the documentation to complete your taxes.

Slips

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Old Age Security & CPP benefits (T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- All other information slips

Receipts

- RRSP contribution receipts
- Support for a child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons & apprentice mechanics)
- Medical expenses
- Charitable donations
- Legal Fees included for getting spousal or child support payments
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses
- Interest paid on student loans
- Carrying charges and interest expenses
- Office-in-home expenses
- Exams for professional certification
- Documentation for any Grants you received

Other documentation

- Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds, or real estate
- Northern residents' deductions receipts
- Business, farm or fishing income/expenses
- Automobile/Travel logbook expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters certification
- Search & Rescue Volunteer certification
- Custody arrangement documentati