Federal Personal Income Tax Return

Tax Year ________

We will soon be approaching the deadline of April 30th in Canada to file your personal tax return. We are providing you with this form to assist you in collecting the necessary information required for us to complete your tax return. You can access a digital copy of this form and other worksheets at http://feltham-associates.ca

Please provide us with a copy of your prior years' Notice of Assessment(s).

Additionally, we require the following information:

1. Personal Information

<table>
<tr><td colspan="2">Name</td><td>SIN</td><td>Date of Birth (dd/mm/yy)</td><td colspan="2">Phone
Office</td><td>Ext</td></tr>
<tr><td>Taxpayer</td><td></td><td></td><td></td><td colspan="2"></td><td></td></tr>
<tr><td>Spouse</td><td></td><td></td><td></td><td colspan="2"></td><td></td></tr>
<tr><td rowspan="2">Address</td><td colspan="3" rowspan="2"></td><td>Home</td><td colspan="2"></td></tr>
<tr><td>Cell</td><td colspan="2"></td></tr>
<tr><td>Email</td><td colspan="3"></td><td colspan="3"></td></tr>
</table>

Do you wish to receive email notifications from the Canada Revenue Agency? ☐ Yes ☐ No

Marital Status: ☐ Married ☐ Single ☐ Common-Law ☐ Divorced ☐ Widowed

If marital status changed during the year, provide date of change (dd/mm/yy): ___________________________

Are you a Canadian Citizen? ☐Yes ☐No Is your spouse? ☐ Yes ☐ No

Are you an US Citizen? ☐Yes ☐ No Is your spouse? ☐ Yes ☐ No

If US Citizen - US SSN# _______________________________ Are you a Volunteer Firefighter? ☐Yes ☐ No

2. Residence

Province or territory of residence on December 31 ______________________________

Did the taxpayer immigrate to Canada or emigrate from Canada during the year? ☐ Yes ☐ No

If yes, provide date of entry into Canada________________________ or date of departure _______________________

3. Elections Canada

Do you consent to sending your name, address and date of birth to Elections Canada so they can confirm the information on their Register? They will not add your name to the register, only correct information already on file. This question must be answered for us to file the tax return. Please indicate below how you would like us to answer this question on your return. We will file the return with the same response as last year if we do not hear from you.

☐ I consent to sending this information ☐ I do not consent to sending this information

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4. Dependants (Children, Spouse etc.)

Name	Relationship	Date of Birth	SIN	Disability Amount	Income	Child Care Expenses

Did you support a parent, grandparent or other dependent in your home during the year? If so, you may qualify for a "caregiver" tax credit. Please provide information above.

5. Types of Income

- ☐ T4 slips from employment earnings.
- ☐ T5 slips for dividend, interest and other investment income.
- ☐ T3 slips for dividend, interest and other investment income.
- ☐ T4A (OAS) slip for Old Age Security payments.
- ☐ T4A (P) slip for Canada Pension Plan benefits.
- ☐ T4A slip(s) for other types of income or pensions received during the year.
- ☐ T4E slip for Unemployment Insurance benefits received.
- ☐ T4RSP and/or T4RIF slips for income received from RRSPs or RIFs.
- ☐ If you worked outside of Canada or have received any income from outside of Canada, please provide this information.
- ☐ If you sold any stocks, bonds, or mutual funds during the year you must report the sale on your return. For each security sold please list the following information: Number of units sold, description of security, year acquired, proceeds, original cost and any selling costs.
- ☐ If you have bonds or GICs you must report the interest earned each year even if it is not received. Please provide us with the face amounts and interest rates of any such investments.
- ☐ Self-employed income. Please sort and summarize the income and expenses for your self-employed earnings. We do not require the receipts but you must keep them for Canada Revenue Agency if they request them in the future. See separate form: Self-employment Expenses
- ☐ Rental income and expenses. Please sort and summarize the income and expenses for each rental property you own. We do not require the receipts but you must keep them for Canada Revenue Agency if they request them in the future. See separate form: Real Estate Rental
- ☐ Income from a limited partnership. Please provide us with any slips and information received.

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☐ If you received alimony or child support payments during the year please let us know the following and whether the terms of your agreement changed during the year. From whom did you receive it

Amount received (alimony) $______________________ ______________________________

Amount received (child support) $______________________ Social Ins.#: ____________________

☐ Other income not described above (such as Contractor payments, Worker's Comp). Please provide the following (attach separate list if necessary).

Amount received $________________________

Source ________________________

5. Deductions and Credits

☐ All RRSP contribution receipts for 2013 including receipts for contributions made in the first 60 days of 2014.

☐ If you had any child care expenses please include the name, Social Insurance Number and amount you paid to each individual or organization. See separate form: Child Care Expenses

☐ Any payments, on behalf of your child, that were for fitness, recreation or art related activities. Please provide all receipts.

☐ If you made alimony or child support payments during the year please let us know the following and whether the terms of your agreement changed during the year. To whom did you pay it:

Amount received (alimony) $______________________ ____________________________

Amount received (child support) $______________________ Social Ins.#: _________________

☐ Please provide us with receipts for any union dues or professional fees paid that are not included in your T4 slip.

☐ Did you pay any interest on money borrowed to earn investment income? If so, please provide us with the amount of any interest paid during the year. If you are able to obtain a letter from the lender which shows the interest paid this would be very helpful.

☐ Did you pay interest on Student Loans? If so, please provide us with the amount of any interest paid during the year. If you are able to obtain a letter from the lender which shows the interest paid this would be very helpful.

☐ Investment counsel fees to earn investment income are deductible on your return. Please provide us with applicable amounts.

☐ Please summarize any deductible employment or commission expenses you incurred during the year. See separate forms: Employment Expenses, Motor Vehicle Expenses, and Home Office Expenses

Note: You only qualify for Home Office Expenses if you either:

a) Primarily work in a home office with no other office locations OR

b) Routinely meet clients at home for business purposes.

☐ If you made any charitable donations during the year please provide us with the receipts. - See separate form: Charitable Donations

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☐ If you had any medical expenses during the year please provide us with the receipts and indicate who each expense was paid on behalf of. See separate form: Medical Expenses

☐ Any tuition fees paid by you, your spouse, or children may be deductible by you. Please provide all receipts.

☐ Did you move during the year? If so, please provide details and expenses incurred but not reimbursed.

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6. Tax Installments

If you were required to make installment payments during the year please provide us with a list of actual payments you made. If you have a statement from Canada Revenue Agency showing the total amount paid, please forward it to us.

8. Rules on Foreign Property

Did you own or have an interest in, foreign property at any time during the year with a total ***cost*** of more than CAN$100,000 *that you used for business or for rental income* ☐ Yes ☐ No

Did you transfer or loan money to a foreign trust during the year or in previous years, or receive a loan or distribution from a foreign trust during the year or in previous years. ☐ Yes ☐ No

Should Canada Revenue Agency determine that you owned or had an interest in foreign property with a cost of more than CAN$100,000 during the year that you used for business/rental, and you have reported otherwise, severe penalties will be imposed. Please contact our office if you have any questions related to these requirements.

9. Paper vs Electronic Courier

In an effort to be move to an entirely paperless operation, and to provide an environmentally friendly option we are offering to send a pdf copy of your return via a secure portal. Should you not wish to have your copy sent this way; a paper copy will be provided for you. Please indicate below how you would like your client copy of the return produced.

☐ Paper Copy ☐ PDF via *iFirm* Portal

10. Summary

We hope you find this checklist helpful in preparing the information for us. To help us complete your return before the April 30th deadline, please bring your information to us, along with a completed copy of this letter, before March 30th. In the meantime, if you have any questions regarding your return please feel free to contact us

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