

Identification

Your Name _____ SIN: _____ DOB _____
 Your spouse _____ SIN: _____ DOB _____
 Address _____ City: _____ Postal Code _____
 Home phone _____ Email: _____
 Work phone _____ Cel phone: _____

Other Information

Marital Status:

Married Widowed Separated Common-Law Divorced Single

Date of Change _____

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

If we are NOT preparing a return for your spouse, please provide the net income figure from line 236 of your spouse's tax return. Line 236 net income of spouse \$ _____

Are you a Canadian Citizen? Yes No Your spouse? Yes No

List any dependents who were under age 18 in the year or who you financially supported during 2017:

NAME	Relationship	Income	Birthdate	SIN
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Are you a US Citizen Yes No

Were you or your parents born in the US? Yes No

- Any changes to personal profile: Marital status, Dependents, Address & Phone Number (Please ensure that we have record of all your dependents)
- [Province of residence](#) on December 31, 2017
- [Home Buyer Plan](#) and/or [Life Learning Plan](#) repayment schedule
- Details on [foreign property](#) owned at any time in 2017
- 2016 Personal Income Tax Notice of Assessment
- [Direct deposit](#) information — bank account transit, bank, and account information or a void cheque
- GST return(s) to file

- Did you invest in [Bitcoin or any other Cryptocurrency](#)? Yes No
- Do you want your tax refund [directly deposited](#) to your bank account? Yes No
- Do you wish to release your address information to Elections Canada? Yes No
- Do you own [specified foreign property](#) with a cost of more than \$100,000? (real property or investments) Yes No
- Did you sell your [principal residence](#) or other real estate? Yes No
- Were you a [first time home owner](#) in 2017? Yes No
- Were you a [volunteer firefighter or search & rescue](#) in 2017? Yes No
- Were you a [teacher or early childhood educator](#) in 2017? Yes No
- Have you made any renovations to your home for accessibility reasons (disability credit or individual over 65) [Home Accessibility Tax Credit](#) Yes No

Income Sources and Relevant Slips

- Employment income T4
- Taxable disability income T4A
- Profit sharing income T4PS
- Commission income T4A / T4
- Old Age Pension T4AOS
- Canada Pension Plan T4AP
- Other pension/annuity T4A
- RRSP income T4RSP
- RRIF income T4RIF
- RRSP withdrawals T4RSP
- EI Benefits T4E
- WCB T5007
- Social Assistance T5007
- Dividend income T5
- Interest income T5
- Limited partnership T5013
- [Canada Child Benefit](#) and Universal Child Care

FOREIGN INCOME & ASSET REPORTING

CRA has released more detailed requirements for reporting on foreign assets in excess of \$100,000 of cost for 2017 and subsequent years. A copy of this form must be filed by the date that your regular tax return is due. There are significant penalties for not filing this form or filing the form late. Please advise us if you have any foreign-owned assets so we can determine whether you must file the [T1135 \(Foreign Income Verification Statement\)](#) with CRA.

Other Income Sources

- [Rental income](#) Schedule of gross rental activity
- [Sale of real property](#) Proceeds of sale & details of adjusted cost base
- [Automobile Expenses](#) Self-employed or allowable employment use of personal automobile
- [Home Office](#) Self-employed or allowable employment use of home office
- [Self-employed income](#) Schedule of gross income & expenses
- [Alimony income/Child support](#) Total received; taxable portion; copy of agreement
- [Sale of investments](#) Proceeds of sale and details of adjusted cost base
- [Other income details](#) (not reported on T-slips, ie. Foreign income, tips, etc.)

Capital Assets Bought/Sold

Where you have rental or self-employed income, we need details of capital assets purchased or disposed of during the year.

If applicable, please provide details or self-employment income and expenses, employment expenses, Home office expenses, automobile expenses, rental property income and expenses, and sale of real estate, in the [Schedules](#) attached.

- [Employment expenses](#)
- [Moving expenses](#)
- [Alimony payments made](#)
- [RRSP contributions](#)
- [Registered Pension Plan contributions](#)
- [Investment loan interest](#)
- [Child care expenses](#)
- [Clergy residence deduction](#)
- [Union dues](#)
- [Professional association dues](#)
- [Travel expenses for employment](#)
- [Legal expenses to collect salary/wages](#)
- [Tax instalment payments](#)
- [Charitable donations](#)
- [Political contributions](#)
- [Tuition fees](#) (for yourself or dependents)
- [Infirm / caregiver credit](#)
- [Public transit passes](#)
- [Adoption expenses](#)
- [Disability credit](#)
- [Interest on student loans](#)
- [Medical expenses](#)
- [Labour sponsored funds contribution](#)
- [Home Buyer's Credit](#)
- [BC Senior's Home Renovation Tax Credit](#)
- Other

Disability and Home Accessibility Tax Credit

- Are you or any of your dependents disabled? If so provide Form T2201 Disability Tax Credit Certificate? Yes No
- Are you the [caregiver](#) for any infirm family members? Yes No
- Do you provide in-home care for a parent or grandparent? Yes No
- Have you made any renovations to your home for accessibility reasons? Yes No

Notices:

If you are going to be away on vacation during tax season please inform us. Bring us your records as soon as possible.

We cannot guarantee completion of your tax return by April 30 if records are received after April 22

Other Information You Would Like To Tell Us About ...

If you're not sure we'll need it, please bring it along anyways

IMPORTANT DATES

- February 28, 2018—last day to contribute to RRSP in order to deduct it on your 2017 tax return
- April 30, 2018—Tax balance due for all 2017 tax returns and filing due for most taxpayers
- June 15, 2018—Tax return filing due for self-employed taxpayers

Thank You For Providing This Information!

Providing us with your most current information will allow us to provide you with the best service when completing your tax return.

L. R. Brager & Associates, Chartered Professional Accountant
Phone 604-998-4069 / Fax 604-243-6990 / lbrager@bragercga.com

SCHEDULES

Self-Employment Income and Expenses

Name of Business _____

Type of Business and address if different from home

Joint Owner and % _____

Income \$ _____

Expenses

Advertising \$ _____

Licenses, Dues, Fees \$ _____

Insurance \$ _____

Interest/Bank Charges \$ _____

Meals/Entertainment \$ _____

Office Supplies \$ _____

Legal & Accounting \$ _____

Rent \$ _____

Salaries \$ _____

Telephone \$ _____

Other Expenses
_____ \$ _____

_____ \$ _____

_____ \$ _____

Equipment Furniture (if you need more space, attach list)
_____ \$ _____

Registered for GST? Yes No

If yes, do the above figures include GST?

Yes No

Automobile Yes No

(fill in at bottom right)

Employment Expenses

Please provide us a copy of your signed T2200 (Declaration of Employment Conditions).

Expenses :

Accounting/Legal Fees \$ _____

Advertising/Promotion \$ _____

Meals/Entertainment \$ _____

Office Supplies \$ _____

Lodging/Travel \$ _____

Parking \$ _____

Telephone \$ _____

Is your employer registered for GST? Yes No

Other Expenses

_____ \$ _____

_____ \$ _____

_____ \$ _____

Were you reimbursed from your employer for part or all the expenses? Yes No

(if yes please provide details)

Home Office
(fill in below)

Yes No

Home Office Expense

Business or Employment Use % _____
(percentage of house used for business or
employment)

Expenses	Total for 2016
Heat	\$ _____
Hydro	\$ _____
Water	\$ _____
Insurance	\$ _____
Maintenance/Repairs	\$ _____
Mortgage Interest	\$ _____
Property Taxes/Rent Paid	\$ _____
Other	\$ _____

Automobile
(fill in below)

Yes No

Automobile Expenses

Year/Make of Car: _____

Purchase Price* \$ _____

Year Purchased** _____

Total Km driven (2016) _____

Business or Employment Use Km's _____

Expenses	Total for 2016
Fuel	\$ _____
Repairs/Maintenance	\$ _____
Insurance	\$ _____
Licensing	\$ _____
Loan Interest	\$ _____
Lease Payments	\$ _____
	\$ _____
	\$ _____
Any per km allowance received?	\$ _____
Other Expenses	\$ _____

**If leased vehicle, please provide a copy of
purchase/lease paperwork.*

***If a vehicle was disposed of in the year, please
provide details.*

Rental Property Income & Expenses

Address: _____

Joint Owner and % _____

Income (rent collected) \$ _____

Expenses \$ _____

Advertising \$ _____

Insurance \$ _____

Mortgage Interest \$ _____

Repairs/Maintenance \$ _____

Property Taxes \$ _____

Salaries/Administration \$ _____

Utilities \$ _____

Condo Fees \$ _____

Other Expenses

_____ \$ _____

_____ \$ _____

_____ \$ _____

Major Renovations & Purchases (i.e. Appliances)

_____ \$ _____

_____ \$ _____

If the property was purchased in the year, please provide the details.

Sale of Real Estate (including principle residence)

Address: _____

Date Sold: _____

Joint Owner and % _____

Date Purchased _____

Purchase Price \$ _____

Legal Cost on Purchase \$ _____

Additions/major improvements:

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

Sale Price \$ _____

Legal Cost on Sale \$ _____

Insurance \$ _____

Commissions Paid on Sale \$ _____

Other Selling Expenses

_____ \$ _____

_____ \$ _____

_____ \$ _____

Please provide the purchase and sale legal documents.

Additional notes, comments, or schedules