



#2 McRae St. Box 723
Okotoks AB T1S 1A8
Office: 403-982-4322

It's Tax Time Again!

The Certified General Accountants Association of Alberta recommends this checklist be completed every year **prior** to commencing the preparation of your tax return. **Please** complete and return to our office with your tax information. If you own a business, have rental properties, claim employment expenses or have moved during the year. Please request a the appropriate form required. Call if you have any questions, we are here to help.

Did you provide your prior Notice of Assessment?	Yes		No
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Mr Mrs Miss Ms Taxation Year: _____

First Name: _____ Email: _____

Last Name: _____ Date of Birth: _____

Address: _____ Home Phone: _____

City: _____ Work Phone: _____

Postal Code: _____ S.I.N: _____

Province of residence in December 31 _____

Do you have Canadian citizenship? No Yes

Do you have foreign citizenship? No Yes If yes, what country? _____

Became or ceased to be a resident of Canada during the year? No Yes If yes, what date? _____

Marital Status on December 31
 Married Widowed Common-Law
 Single Separated Divorced

If Married or Common-Law, please complete:

Mr. Mrs. Miss Ms. Spouse's Name: _____

Spouse's Date of Birth (M/D/Y) _____ Spouse's S.I.N _____

Will S&J be processing Spouses Tax Return: No Yes

If no, Spouse's net income for taxation year \$ _____

Did your marital status change during year? No Yes Date of change _____



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Personal Tax Information Request Form

Please check all that apply for the current tax year and ensure you provide us with supporting documents. For multiple years please indicate which applies to what year:

DEDUCTIONS AND CREDITS

- Adoption Expenses
- Annual union, professional, or like dues
- Apprenticeship Job Creation (for employers only)
- Caregiver Amount
- Child care expenses
- Children's Art Tax Credit (for 2016 year ONLY)
- Children's fitness amount (for 2016 year ONLY)
- Disability Tax Credit (Pls fill out questionnaire)
- Donations and gifts
- Family Caregiver Amount
- Family Tax Cut *removed for 2016 year*
- Firefighters Volunteer Tax Credit
- First Time Donor Super Credit
- Home Renovations (for 2009 year ONLY)
- Interest paid on your student loan
- Investments
- Medical expenses for self, spouse, or common law partner and your dependent children
- Moving expenses (Pls fill out questionnaire)
- New Home Buyers (must provide Certificate of Title)
- Northern Residents Deductions
- Other employment expenses (must provide a T2200)
- Public transit pass amounts
- Registered Retirement Savings Plan (RRSP) Deductions / RRSP Contributions
- Rental Property (Pls fill out questionnaire)
- Sale of Principle Residence (must provide Sale of Residence)
- Support Payments made
- Tax free savings account
- Teacher and Early Childhood Educator School Supply Tax Credit
- Tuition, education, and textbook amounts
- Other: _____

SOURCES OF INCOME

- Any T4 slips T4 T4A T4E
- T4RSP – RRSP Withdrawal
- Any T5 slips (eg. T5, T5018, etc...)
- Any T3 slips
- Sole Proprietorship/Self employment income. If yes, are you a GST registrant? Yes No
- Tips/Gratuities
- Other: _____
- T5008 slip (Need Book Value)



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Dependent Information: *(Please include S.I.N where available)*

First Name	Last Name	Date of Birth M/D/Y	Relationship	S.I.N	Net Income

Do you pay or receive any taxable child

Maintenance payments? \$_____ Per month Receive or Pay (circle one) Do you have applicable legal documents available? _____

If you pay: Recipients name: _____ S.I.N # _____

Anyone permanently disabled _____ Has T2201 (Disability Tax Credit Certificate) been filed? _____

Additional Information:

*Do you own any assets outside Canada at Anytime during the year with a cost of excess Of \$100 000(Canada) Yes No

*Did you pay **personal tax installments** to CRA this year? Yes No
Amount \$ _____

* Have you filed for bankruptcy? Yes No
If yes what year and provide details _____

* Authorization for Elections Canada? Yes No

* Do you want your return e-filed? Yes No

“We are your office!”



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*Do you give S&J Management Ltd. permission to email
you a PDF copy of your entire personal tax return
(as this will not be printed out)?

Yes No

Email Address: _____

Question/Concern: _____

Email/phone/fax/other: _____

***I have disclosed all sources of income earned this year for preparation of this tax return.**

Signature: _____

Date: _____

*All questions marked with an asterisk **MUST** be completed.

**S&J Management Ltd. is not responsible for
missing or inaccurate information.**