

Please complete all sections where there have been changes **PLUS all mandatory (\*)** fields.

### TAXPAYER'S INFORMATION

\*Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 \_\_\_\_\_ YYYY/MM/DD  
 SIN: \_\_\_\_\_

\* Marital Status: \_\_\_\_\_

\* Did your status change in 2017 Y  N  Date of Change: \_\_\_\_\_  
 \_\_\_\_\_ YYYY/MM/DD

Are you a US Citizen Y  N

### SPOUSE'S INFORMATION

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 \_\_\_\_\_ YYYY/MM/DD

SIN: \_\_\_\_\_

Net Income (if filing separately): \$ \_\_\_\_\_

### DEPENDANT'S INFORMATION

Name: \_\_\_\_\_ M  F  Date of Birth: \_\_\_\_\_  
 \_\_\_\_\_ YYYY/MM/DD

Name: \_\_\_\_\_ M  F  Date of Birth: \_\_\_\_\_  
 \_\_\_\_\_ YYYY/MM/DD

Name: \_\_\_\_\_ M  F  Date of Birth: \_\_\_\_\_  
 \_\_\_\_\_ YYYY/MM/DD

### CONTACT INFORMATION

Address: \_\_\_\_\_ \* Phone / Cell: \_\_\_\_\_  
 \_\_\_\_\_ Work: \_\_\_\_\_

City / Province: \_\_\_\_\_ \* Email: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Spouse's Email: \_\_\_\_\_

Please complete all questions in the following sections.

### \*PRINCIPAL RESIDENCE

Did you sell your principal residence during the year? Y  N

IF YES                      Sale Price:        \$                      \_\_\_\_\_

   Year of Purchase:                      \_\_\_\_\_

Has there been any change in the use of your principal residence? (ie. Rental)                      Y  N

### OTHER INFO

Did you own foreign property at any time during the year that was worth more than \$100,000, including investments?                      Y  N

Rental Income:                      Y  N   
(attach statement of rental income)

Self Employed:                      Y  N   
(attach statement of business income)

### \*TAX CREDITS / DEDUCTIONS

Charitable Donations:                      Y  N

Child Care Expenses:                      Y  N

Employment Expenses:                      Y  N   
(needs signed T2200 – attach automobile and home office schedules)

Medical and Dental Expenses:                      Y  N

Membership Dues:                      Y  N

RRSP Contributions:                      Y  N

Tuition Fees:                      Y  N

Do you claim the disability amount?                      Y  N

If yes, is this the first year that it is being claimed?                      Y  N

Property Taxes / Rent Paid:                      \$ \_\_\_\_\_

Tax Paid by installments:                      \$ \_\_\_\_\_

### QUESTIONS TO ANSWER

Y    N

1. Are you the **caregiver** for any infirm family members? Did you provide **in-home care** for an infirm **dependent relative**?
2. Did you provided **in-home care** for a **parent or grandparent** (including in-laws) 65 years of age or over, or an infirm dependent relative? A federal tax credit may be available. Certain provincial credits may also be available. Also, the caregiver may claim related **training costs** as a medical expense credit.
3. Do you want your **tax refund** deposited directly into your account at a financial institution?
4. If you have **children up to the age of 17**, have you received **Canada Child Benefit (CCB)**?
5. Did you purchase a new home in 2017? If so, you may be eligible for the new **residential property GST/HST rebate**. Also, are you a first-time **home buyer** in 2017? A federal tax credit based on \$5,000 (@15% = \$750) may be available.
6. Are you a **U.S. citizen, Green Card Holder**, or were you, or your parents **born in the United States**? You may have U.S. filing obligations.
7. Did you incur costs to access **medical intervention** required in order to **conceive a child** which was not previously allowed as a medical expense? Amounts may be claimed in respect of any such expense for the previous 10 years (if amounts were incurred in 2017, a claim must be made by the end of 2017).
8. Have you spent more than 200 hours acting as a **volunteer firefighter** or a **search and rescue volunteer**? You may be eligible



for a federal tax credit.

- 9. Are you an **aboriginal person**? Special tax rules may apply.
- 10. Do you authorize CRA to give your name, address, date of birth, and citizenship to **Elections Canada** to update the National Register of Electors?
- 11. Have you made any contributions to a **gifting tax shelter**?
- 12. Did you receive any **significant prizes or awards** from your, or a related person's place of employment?
- 13. Did you receive a retroactive **lump-sum payment** over \$3,000 (for example, spousal support)? In certain cases, some tax relief may be available.
- 14. **Other provincial and territorial tax credits** may be available in your jurisdiction such as certain property taxes and residential rent paid in Ontario.