

Primary Contact Name	Spouse Name
Social Insurance No.	Social Insurance No.
Date of Birth	Date of Birth
Phone _____ Cell Home Work _____	Phone _____ Cell Home Work _____
Phone _____ Cell Home Work _____	Phone _____ Cell Home Work _____
Email	Email

Current Address	Previous Address – if moved during the year
Province of residence December 31 st ?	Date of Move:

Dependent Name	Social Insurance No.	Date of Birth		
		Month	Day	Year

Marital status on December 31 st (circle one) <i>Single Married Common-law Divorced Separated Widowed</i>		
If marital status changed during the year provide the date of change:		
Do you have, or share, custody of a child after a relationship breakdown?	Yes	No
NEW – Sale of Principal Residence: Did you sell your principal place of residence in 2016?	Yes	No
Did you own/hold foreign property with a cost of \$100,000 or more at any time during the year? (includes U.S. property and investment portfolios with stocks or mutual funds with U.S. or International holdings)	Yes	No
Do you spend extended periods of time in the United States?	Yes	No
Are you a U.S. citizen, Green Card Holder, or were you, or your parents born in the United States?	Yes	No
May CRA provide information to Elections Canada?	Yes	No
Have you previously been setup for Direct Deposit?	Yes	No
If not, do you want to set up Direct Deposit with CRA? If yes, you must provide a VOID cheque.	Yes	No
Has your banking information changed since your last direct deposit from CRA?	Yes	No
Did you pay personal tax installments during the year? If yes, \$ _____	Yes	No
Did you withdraw RRSP's to buy a new home or to finance full-time education for you or your spouse?	Yes	No
Are you missing any tax slips (T4, T5, T4A etc.)? If yes, provide details.	Yes	No
Internet Business Activity: Do you have a webpage or websites from which you earn income?	Yes	No

Northern Residents Deduction:

1. Did you reside in a prescribed northern zone for a continuous period of at least six consecutive months? If not the full year, provide dates: from _____ to _____
2. Will any others who are sharing this residence be claiming the Northern Residents deduction?
3. Does your T4 include Box 32 Northern Travel? If yes, provide information for two trips you took during the year (destination, dates and names of all family members travelling).

Check the boxes below that are applicable to your tax return and include any additional details.

Income	
T4 - Employment Income	T5013 - Limited Partnership Income
T4A - Other Income	T5008 - Statement of Security transactions
T4AP - CPP Benefits	Capital Gains / Losses
T4A OAS - Old Age Security	Interest on personal tax refund
T4E - Employment Insurance benefits	Rental Income & related expenses
T4 RSP - RRSP Income	Self Employment income & related expenses (include website, if applicable)
T4 RIF - RRIF Income	Scholarship, fellowship, bursary
T5 - Interest and Dividend Income	Alimony / Spousal Support received
T3 - Estate/Trust / Mutual Funds income	Taxable Child support received
T5007 - Social assistance /WCB	Pensions – certain pensions can be split with spouse
RC62 - Universal Child Care Benefit for children under 6 years of age	Foreign sources
Other Income:	

Deductions, Tax Credits and Expenses	
RRSP contribution receipts	T2201 Disability tax credit
Professional Dues	T2202 Tuition and Education
Child care expense	T2202 Tuition transferred from dependent
Employment expenses – T2200 required	Child Fitness and/or Arts credit
Moving expenses	Public transit pass
Spousal and/or Child Support paid	Interest paid on Student Loans
Family caregiver amount	Investment counsel and management fees
Interest on money borrowed to purchase investments	Adoption related expenses
Tradesperson's tools acquired by an employee	Charitable and/or Political donations
Pension Split: spouses may jointly elect to split certain pension income reported by the other spouse	Are you a first time home buyer?
Tools acquired by apprentice vehicle mechanics	Medical expense including premiums paid to a private health services plan i.e. Alberta Blue Cross
NEW - Eligible educator school supply tax credit Teachers/Early Childhood Educator school supplies	NEW – Home accessibility tax credit Home renovations for disabled person or senior citizen
Other Deductions, Tax Credits or Expenses:	

IMPORTANT: If you do not report all of your income slips (T4, T4A, T5, T3, etc.) when filing your personal income tax return, significant penalties and interest may be assessed by CRA. If you believe that you have not received all of your 2016 slips please provide details of any missing information.

Visit www.ddcllp.ca for additional tax information and forms