

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 Province of residence December 31 st ?	Previous Address – if moved during the year Date of Move:
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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
Did you sell any property (principal residence, rental property, vacation property etc.) during the year?	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		Deductions, Tax Credits and Expenses	
T4 - Employment Income		RRSP contribution receipts	
T4A - Other Income		Professional Dues	
T4AP - CPP Benefits		Child care expense	
T4A OAS - Old Age Security		Employment expenses – T2200 required	
T4E - Employment Insurance benefits		Moving expenses	
T4RSP - RRSP Income		Spousal and/or Child Support paid	
T4 RIF - RRIF Income		Adoption related expenses	
T5 - Interest and Dividend Income		Charitable and/or Political donations	
T3 - Estate/Trust / Mutual Funds income		Tradesperson’s tools acquired by an employee	
T5007 - Social assistance /WCB		Tools acquired by apprentice vehicle mechanics	
T5013 - Limited Partnership Income		T2201 Disability tax credit	
T5008 - Statement of Security transactions		T2202 Tuition and Education	
Capital Gains / Losses		T2202 Tuition transferred from dependent	
Interest on personal tax refund		Public transit pass: January 1 – June 30, 2017	
Rental Income & related expenses		Interest paid on Student Loans	
Self Employment income & related expenses (include website, if applicable)		Eligible educator school supply tax credit Teachers/Early Childhood Educator school supplies	
Scholarship, fellowship, bursary		Investment counsel and management fees	
Alimony / Spousal Support received		Interest on money borrowed to purchase investments	
Pensions – certain pensions can be split with spouse		Are you a first time home buyer?	
Foreign sources		NEW - Caregiver amount	
Other Income:		Pension Split: spouses may jointly elect to split certain pension income reported by the other spouse	
		Medical expense including premiums paid to a private health services plan i.e. Alberta Blue Cross	
		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 2017 slips please provide details of any missing information.

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