



# Individual Tax Return Form

**Thank you for choosing Premier Accounting & Tax Ltd. for your individual tax return this year!**

Please fill out the following form using as much detail as possible. If you have any questions regarding the form, please do not hesitate to ask!

**Client Information:**

First Name: \_\_\_\_\_ Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Insurance Number (SIN): \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Preferred Contact Method:  Phone  Email Best Method of Returning Taxes:  In-Person  Mail

Phone Number: \_\_\_\_\_ Alternate Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_ Best Time to Call: \_\_\_\_\_

Marital Status on December 31<sup>st</sup> last year:  Single  Married  Common-Law  Widowed  Divorced  
 Separated

**Spouse of Common-Law Partner Information (if applicable):**

Last Name	First Name	Date of Birth	Net Income	Post Secondary Student? (Y or N)	Disabled? (Y or N)

**Dependents\*:** If applicable – Children, parents, grandparents, etc. living at the same address (additional space below)

Last Name	First Name	Date of Birth	Net Income	Relationship	Post-Secondary Student (Y or N)	Disabled (Y or N)

1. a) Are you a U.S. citizen by birth or bloodline? B) Do you have a Green Card (lawful permanent resident of the U.S.)?  
 c) Were you physically present in the U.S. for at least 183 days during tax year?  
 (Check YES if any of above are true) .....  Yes  No

2. Do you have an incorporated business? .....  Yes  No

3. Do you need to complete an Estate return or file for a deceased person? .....  Yes  No

4. Are you self-employed, did you own your own business or work for a placement agency?  Yes  No

*Please continue to next page for further questions*



# Individual Tax Return Form Continued

5. Are you currently in Bankruptcy status?.....  Yes  No
6. Did you work outside Canada or have foreign employment or foreign pension income? ..  Yes  No
7. Excluding RRSPs, do you have an investments, own any rental properties or sell your principal residence last year?..... Yes  No
8. Are you claiming employment expenses (employer reimburse you for office or vehicle expenses)?.....  Yes  No
9. Did you move to Canada last year or switch provinces? .....  Yes  No
10. Are we preparing more than one tax return for you? .....  Yes  No

**Any other information you think we should know?** \_\_\_\_\_

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**Dependents\*:** If applicable – Children, parents, grandparents, etc. living at the same address

Last Name	First Name	Date of Birth	Net Income	Relationship	Post-Secondary Student (Y or N)	Disabled (Y or N)

Client Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_

Please Check Items You Have Attached:

**SLIPS**

- T4 slips (Employment income)
- Employment insurance benefits (T4E)
- Self-Employment Income  
(Sales/Expenses List)
- Interest, dividends, mutual funds  
(T3, T5, T5008)
- Tuition / education receipts (T2202A)
- Universal Child Care Benefit (RC62)
- Old Age Security and CPP benefits  
(T4A-OAS, T4AP)
- Other pensions and annuities (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits  
(T5007)
- All other information slips, Receipts,  
documentation

**RECEIPTS**

- RRSP contribution receipts, Support for a  
child, spouse or common-law partner
- Professional or union dues
- Tool expenses (Tradespersons &  
apprentice mechanics)
- Medical expenses
- Charitable donations
- Political contributions
- Child care expenses
- Adoption expenses
- Moving expenses Receipts
- Interest paid on student loans
- Carrying charges and interest expenses
- Office - in-home expenses
- Exams for professional certification

**OTHER DOCUMENTATION**

- Notice of Assessment/Reassessment  
Canada Revenue Agency correspondence
- Sale or deemed sale of stocks, bonds or  
real estate
- Northern residents deductions receipts
- Volunteer Firefighters or Search and  
Rescue volunteers certifications
- Rental income and expense receipts
- Business, farm or fishing income/expenses
- Automobile / Travel logbook and expenses
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment  
(T2200)
- Custody Arrangement documentation