

**1. Personal Information - please use blank paper if information does not fit**

Name		SIN	Date of Birth	Phone(s)
Taxpayer				Home:
Spouse				Work:
Address:			Is this address new?	Cell:
			Sale of principal residence?	Email:

Marital Status:  Single  Married  Common-Law  Widowed  Separated  Divorced

Change of Status in Year?:  If Yes - Date:  Did Spouse File Own T1?  Net Income from Line 236?

**2. Dependents**

Name	Relationship	Claim Child Amount?	Date of Birth	SIN	Disability Amt?	Tuition transfer?	Lived w. you	Net Income Line 236
		yes / no						
		yes / no						
		yes / no						

If single and children living with you - Claim child as eligible dependent? Is child living with different parents through the year? Please provide details on separate page.

Do you have infirm family member or other infirm dependents living with you? We will need doctors note indicating infirmity - this is for the NEW Family Caregiver Credit

**3. Income**

	Individual	Spouse		Individual	Spouse
T4	<input type="checkbox"/>	<input type="checkbox"/>	T3's T5's	<input type="checkbox"/>	<input type="checkbox"/>
T4A **	<input type="checkbox"/>	<input type="checkbox"/>	T5013	<input type="checkbox"/>	<input type="checkbox"/>
T4E	<input type="checkbox"/>	<input type="checkbox"/>	<b>Disposition of Capital Property</b> - provide details (sales/purchases)		
T4A(P) CPP	<input type="checkbox"/>	<input type="checkbox"/>	May include: real estate, shares, mutual funds,		
T4A(OAS)	<input type="checkbox"/>	<input type="checkbox"/>	- may include gifts of real property/stocks etc or donations of shares to charity		
T4RSP / T4RIF's **	<input type="checkbox"/>	<input type="checkbox"/>	eg - Mutual Funds	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Pension - details	<input type="checkbox"/>	<input type="checkbox"/>	eg - Real Estate	<input type="checkbox"/>	<input type="checkbox"/>
US Social Security - year started receiving	<input type="checkbox"/>	<input type="checkbox"/>	eg - Stocks/T5008	<input type="checkbox"/>	<input type="checkbox"/>
T4PS / WCB / T5007 etc	<input type="checkbox"/>	<input type="checkbox"/>	<b>Business - income/exp</b>	<input type="checkbox"/>	<input type="checkbox"/>
Apprenticeship Incentive Grant	<input type="checkbox"/>	<input type="checkbox"/>	New!! - did you enter into an agreement to pay EI?	<input type="checkbox"/>	<input type="checkbox"/>
RC62 UCCB payment (kids < 6)	<input type="checkbox"/>	<input type="checkbox"/>	<b>Rentals - income/exp</b>	<input type="checkbox"/>	<input type="checkbox"/>
Child Support or Alimony rec'd	<input type="checkbox"/>	<input type="checkbox"/>	<b>Farm - income/exp</b>	<input type="checkbox"/>	<input type="checkbox"/>
- provide details + agreement			<b>Other income no slips:</b> eg Tbills/private loans	<input type="checkbox"/>	<input type="checkbox"/>

**4. Deductions & Credits - please provide RECEIPTS for all of the following expenses**

<b>Union dues</b>	<input type="checkbox"/>	<b>Child Care Exp:</b>	<input type="checkbox"/>	<b>Medical expenses</b> - incl. dental etc	<input type="checkbox"/>
<b>Professional dues</b>	<input type="checkbox"/>	- receipts with names, SIN of provider	<input type="checkbox"/>	<b>Medical travel (details + doctors note)</b>	<input type="checkbox"/>
<b>Employment Expenses</b>	<input type="checkbox"/>	<b>Child Fitness Credit:</b> (16yrs or under in '11)	<input type="checkbox"/>	<b>Disability (T2201)</b>	<input type="checkbox"/>
-provide details + T2200 signed		<b>Child Arts Credit</b> (16yrs or under in 2011)	<input type="checkbox"/>	<b>Attendant / disability supports</b>	<input type="checkbox"/>
<b>Transport employee (TL2)</b>	<input type="checkbox"/>	<b>Alimony or spousal support paid:</b>	<input type="checkbox"/>	<b>Adoption / InVitro</b>	<input type="checkbox"/>
- requires overnight trips		- Receipts or cancelled chqs			
<b>Tools for trades (&gt; \$1060)</b>	<input type="checkbox"/>	- Name and SIN of payee+copy of agreement		<b>Donations (charity/political)</b>	<input type="checkbox"/>
<b>Apprenticeship program?</b> -sign T1014	<input type="checkbox"/>	<b>Child Amount</b> - confirm who claims	<input type="checkbox"/>	<b>Interest Expense (investing)</b>	<input type="checkbox"/>
- provide support for level completed		New!!! <b>Family Caregiver Tax Credit</b>	<input type="checkbox"/>	<b>Investment Advisory Fees</b>	<input type="checkbox"/>
<b>Firefighters credit?</b> (new)	<input type="checkbox"/>			<b>Accounting Fees (investing)</b>	<input type="checkbox"/>
<b>Moving Expenses</b> - dates, distances	<input type="checkbox"/>	<b>Student Loan Interest</b>	<input type="checkbox"/>	<b>Legal Fees (special cases)</b>	<input type="checkbox"/>
addresses, employers, etc.		<b>Tuition/Education (T2202)</b>	<input type="checkbox"/>		
		- sign back of slip if transferring to parent		<b>Safety Deposit Box:</b>	<input type="checkbox"/>
<b>New Home Buyer's Tax Credit</b>	<input type="checkbox"/>	<b>Transit Pass</b> - must be monthly	<input type="checkbox"/>	\$ _____	
- available if purchased home in 2011		<b>RRSP</b>	<input type="checkbox"/>		
and did not own a home in the past 5 years.		<b>Life-Time Learning LLP</b> (RRSP repaid?)	<input type="checkbox"/>	<b>Tax Installments:</b>	<input type="checkbox"/>
		<b>Home Buyers Plan</b> (HBP - RRSP repaymts)	<input type="checkbox"/>	\$ _____	
<b>Foreign Tax Credits</b>	<input type="checkbox"/>	<b>Labour sponsored funds</b> T5006	<input type="checkbox"/>		
(copy of Foreign slips or tax returns)					

**5. Foreign Reporting**

Did the taxpayer own or hold foreign property with an aggregate cost of \$100,000 CAD or more at any time in the year? YES  NO

**6. Direct Deposit, Pension Splitting, Elections Canada and Certification**

Would you like to start or change Direct Deposit? YES  NO

Are you a Canadian Citizen? YES  NO

If Yes, update name/address for Elections Canada? YES  NO

See: [www.yule.ca](http://www.yule.ca) for a more detailed questionnaire

\*\* Pension splitting - I am interested in pension splitting YES  NO

- if yes, we will contact you to discuss this option.

**Notices of Assessment for 2010** (any CRA correspondence received).

**T1 Output Options:** PAPER or EMAIL PDF