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To assist in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation. (Optional – total receipts by category and attach a calculator tape.) In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

For information on Audits, refer to [Understanding Tax: Audits](#).

For information on Personal Tax, refer to [Understanding Tax: Personal Tax](#).

Name \_\_\_\_\_

**New Client or New Information**

<input type="checkbox"/>	Street	Phone
<input type="checkbox"/>	City Postal	Cell
<input type="checkbox"/>	Email	Birthday (m/d/y) / /

**Marital Status**

<input type="checkbox"/>	Married or Common-Law	<input type="checkbox"/>	Spouse
<input type="checkbox"/>	Single or Widowed	<input type="checkbox"/>	Birthday (m/d/y) / /
<input type="checkbox"/>	Separated or Divorced	<input type="checkbox"/>	SIN: - -
<input type="checkbox"/>	Date of status change / /	<input type="checkbox"/>	Net income

**Dependents**

Name	Birthday (m/d/y)	SIN	Gender	Net Income
<input type="checkbox"/>		- -	M F	\$
<input type="checkbox"/>		- -	M F	\$
<input type="checkbox"/>		- -	M F	\$

**Other**

<input type="checkbox"/>	Are you a Canadian citizen?	Y	N
<input type="checkbox"/>	Release information to Electons Canada?	Y	N
<input type="checkbox"/>	Direct deposit GST credit, Tax Refund and/or Child Tax Benefit?	Y	N (if YES, please supply VOID cheque)
<input type="checkbox"/>	Has direct deposit information previously been supplied to CCRA?	Y	N
<input type="checkbox"/>	Did you hold any foreign property in the year, where the total cost exceeded \$100,000 CDN?	Y	N

**Documents**

<input type="checkbox"/>	Notice of Assessment	<input type="checkbox"/>	Summary of instalment payments and receipts
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**New Clients**

<input type="checkbox"/>	Prior year tax return and schedules
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**Income**

<input type="checkbox"/>	<b>Personal</b>	<input type="checkbox"/>	<b>Investment</b>
<input type="checkbox"/>	T4 – Employment Income	<input type="checkbox"/>	T3 – Estate/Trust/Mutual Funds Income
<input type="checkbox"/>	Other Employment Benefits	<input type="checkbox"/>	T5/T3 – Interest and Dividend Income
<input type="checkbox"/>	T4A (OAS) – Old Age Security	<input type="checkbox"/>	T600 – Canada Savings Bonds
<input type="checkbox"/>	T4A (P) – CPP Benefits	<input type="checkbox"/>	T5008 – Statement of Security Transactions
<input type="checkbox"/>	T4A – Pension and other income	<input type="checkbox"/>	T5013 – Limited Partnership Income
<input type="checkbox"/>	T4E – Employment Insurance benefits	<input type="checkbox"/>	Capital Gains/Losses*
<input type="checkbox"/>	T5007 – Social Assistance/WCB	<input type="checkbox"/>	Rental Income (use checklist)
<input type="checkbox"/>	T4 RSP – RRSP Income	<input type="checkbox"/>	Foreign Income
<input type="checkbox"/>	T4 RIF – RRIF Income	<input type="checkbox"/>	Interest on Tax Refund(s) \$ _____
<input type="checkbox"/>	RC 62 – Universal Child Care Benefit		
<input type="checkbox"/>	<b>Other</b>		
<input type="checkbox"/>	Self-Employed Income (use checklist)	<input type="checkbox"/>	Taxable Child Support \$ _____
<input type="checkbox"/>	Alimony Received: \$ _____	<input type="checkbox"/>	Scholarships/Bursaries \$ _____

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**Deductions**

- RRSP Contribution Receipts \$ \_\_\_\_\_
- Union, Professional Dues
- Alimony Paid \$ \_\_\_\_\_
- Deductible Child Support Paid: \$ \_\_\_\_\_
- Safety Deposit Box Charges \$ \_\_\_\_\_
- Interest and Carrying Charges on Investments
- Investment Counsel and Accounting fees
- Employment Expenses (use checklist)

- Deductible Legal Fees
- Child Care Expenses
- Moving Expenses
- Allowable Business Investment Losses
- Capital Loss Carry Forwards
- Non-Capital Loss Carry Forwards
- Limited Partnership Losses of Other Years
- Employment Insurance Benefit Repayments

**Tax Credits**

- T2201 – Disability Deduction
- T2202 – Tuition Fees/Education Credit
- T2202 – Tuition Fees/Education Credit  
(For transfer from dependant, complete reverse of slip.)
- Interest Paid on Student Loans

- Medical Receipts
- Attendant Care Expenses
- Charitable Donations
- Political Contribution Receipts
- Working Opportunity Fund

**Keeping Records**

Generally you must keep your records for six years from the end of the taxation year to which they relate. For more information about keeping records, see [Understanding Tax: Record Retention](#).

**Notes and Questions**

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For most Canadian families, income tax is the largest single annual cash outlay. By implementing a variety of tax planning strategies, a family can minimize the effects of this burden. To be effective and compliant requires a thorough understanding of the rapidly changing rules and legislation. At **Munro & Company**, we prepare tax returns for individuals, businesses and corporations with basic and advanced tax requirements. Whether you are an employee, business owner, investor, or retiree, we can help you keep more of your hard earned income.