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| 1. **Personal Information** |

Has your personal information changed since the last tax return? Please indicate any changes below.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | | Phone | |
| Home | Cell |
| Taxpayer | Click here to enter text. |  |  |
| Spouse | Click here to enter text. |  |  |
| Address | Click here to enter text. | | |
| Email \* | Click here to enter text. | | |

**Would you like us to send your personal tax return to the email provided (password-protected)?  Yes  No**

Marital Status:  Married  Single  Common-law  Separated  Widowed

If marital status changed during the year, provide date of change (mm/dd):

Are you, and/or spouse, a U.S. Green Card Holder?  Yes  No

Did you, and/or spouse, spend more than 120 days in the U.S. during 2021?  Yes  No

Do you have a will?  Yes  No

If yes, is it up-to-date?  Yes  No

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| 1. **Elections Canada** |

Are you a Canadian Citizen?  Yes  No

Would you like Canada Revenue Agency to provide your information to Elections Canada?  Yes  No

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| 1. **Foreign Property / Real Estate** |

Did you own or hold foreign property, at any time in **2021,** where the total cost of amount was more than CAN $100,000?

If yes, please provide the related documents.  Yes  No

Did you dispose of a principal residence and/or other real estate at any time in **2021**?  Yes  No

If yes, please provide the related documents.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. **Dependants** | | | | | | |
| Name | Relationship | Date of  Birth (mm/dd/yy) | SIN | Physically or Mentally Infirmed? | Income | Child Care Expenses |
| Click here to enter text. |  |  |  | Yes  No | Yes No | Yes  No |
| Click here to enter text. |  |  |  | Yes  No | Yes  No | Yes  No |
| Click here to enter text. |  |  |  | Yes  No | Yes  No | Yes  No |
| Click here to enter text. |  |  |  | Yes  No | Yes  No | Yes  No |

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| 1. **Checklist** |
| Please review the list of income and deductions/credits below, and check off those items that apply to you and your spouse. |

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| --- | --- | --- | --- | --- | --- |
| **Taxpayer** | **Spouse** |  | **Taxpayer** | **Spouse** |  |
| **Income** | | | | | |
|  |  | Employment Income (T4 or T4A Slips) |  |  | Rental Income and Expenses |
|  |  | Pension Income (T4A, T4OAS, T4AP Slips) |  |  | Capital Gains (Please indicate the cost and proceeds of any asset disposals) |
|  |  | Employment Insurance Benefits (T4E Slips) |  |  | Self-Employment Income and Expenses |
|  |  | Investment Income – Interest Dividends (T5 Slips) |  |  | Retirement Income (RRSP, RRIF, Annuity) |
|  |  | Estate/Trust/Mutual Fund Income (T3 Slips) |  |  | Other Income, Support Received, Death Benefits, etc. |
|  |  | Partnership Income (T5013) |  |  |  |
| **Deductions and Credits** | | | | | |
|  |  | RRSP Contributions |  |  | T2200/TLI2 Forms (Employment Expenses |
|  |  | Tuition Receipts (T2202 Form) |  |  | Disability Tax Credit (Self or Dependents) |
|  |  | Union, Professional Dues Receipts |  |  | Charitable Donations |
|  |  | Child Care Expenses |  |  | Student Loan Interest Statement |
|  |  | Moving Expenses |  |  | Eligible Support Payments |
|  |  | Medical Expenses |  |  | Other Deductions (Carrying Charges, Interest) |
|  |  | Were you required to work from home due to COVID-19 (# of days) |

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| 1. **Additional Information** |
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Please sign below.

Signature Date

**THIS FORM MUST BE RETURNED WITH YOUR TAX INFORMATION**

This client information summary is provided to all personal tax clients as part of the personal tax engagement package. Although this information has been gathered in previous years for continuing clients, we are required by the Canada Revenue Agency to confirm specific details related to the preparation of your personal tax return in each tax year.

Here is the personal tax organizer page link: <http://www.algarpetryk.com/personal_tax_organizer.html>