

In an effort to save you money and time, we have prepared simple checklists for you. Please bring in this completed checklist along with your tax documents. (Do not email your documents or send us your CDs please.)

Please note that we have a two-week turnaround. We do guarantee that your return will be completed by the April 30 deadline provided that we have all documentation and required information at least 2 weeks before the deadline.

Name (s): _____ Address (to use on tax return) _____
 DOB: (d/m/y) _____
 SIN: _____ **Were you living in BC on December 31st 2007?** _____

If we are **not** doing your spouse's taxes, complete:
 Spouse Name: _____ Spouse Earnings [line 236 on tax return] _____

- | | |
|---|--|
| <input type="checkbox"/> T4 (employment income) | <input type="checkbox"/> RRSP contributions receipts |
| <input type="checkbox"/> T4A (other income) | <input type="checkbox"/> Child care expenses (daycare name, or name & SIN of babysitter, # of weeks) |
| <input type="checkbox"/> T3 (investment income) | <input type="checkbox"/> Tuition receipts |
| <input type="checkbox"/> T5 (investment income) | <input type="checkbox"/> Medical receipts for family (Dental & extended medical premiums also) |
| <input type="checkbox"/> Dec. 31 Investment statement | <input type="checkbox"/> Donation receipts |
| Showing capital gains | <input type="checkbox"/> Public Transit Pass/Receipt |
| <i>Use our checklist if you don't invest with us</i> | <input type="checkbox"/> Student loan interest statement |
| <input type="checkbox"/> T2200 (if employment expenses) | <input type="checkbox"/> Union or professional dues receipts |
| <input type="checkbox"/> Notice of Assessment (last tax year) | <input type="checkbox"/> Support payment paid ___ Taxable or not? |
| <input type="checkbox"/> TRSP, TRIF (RRSP/RRIF Income) | <input type="checkbox"/> Moving Expense – |
| <input type="checkbox"/> Support payment received ___ taxable or not? | Must be submitted with our Moving Expense Checklist |
| <input type="checkbox"/> Tips \$ _____ | <input type="checkbox"/> Safety Deposit Box \$ _____ |
| <input type="checkbox"/> Commissions not reported on T-Slip | <input type="checkbox"/> Tax instalments \$ _____ |
| <input type="checkbox"/> Child Tax Benefit Receipts | <i>(Total made for the year)</i> |
| <input type="checkbox"/> New child in 2007? | <input type="checkbox"/> Do you have to make a Home Buyer's Plan repayment? |
| - M ___ or F ___ - SIN: _____ | |
| - D.O.B.: M ___ D ___ Y ___ | |
| - Name: _____ | |

Do you think you have ALL your documents yet? **T3s & T5s** mail out deadline is end of February !!!
 Call your bank to make sure you received all your T3 and T5 slips.

Here is our 2007 tax year preparation price list:

For Business, Rental, Moving, Medical and Employment expenses you must complete our special Checklist worksheet in order to get these low preparation fees.

	<u>checklist fee</u>	<u>NO Checklist fee</u>		<u>Checklist fee</u>
Basic return	\$49	\$60	Quebec Return	\$65 *
Basic - one T4 only	\$39	\$50	USA Return	\$150 *
Medical expenses worksheet	\$35	\$75	Other forms	\$15 *
Moving Expense Worksheet	\$55 *	\$100	Foreign Income Worksheet	\$40
Rental Income Worksheet	\$75 *	\$150	Extra time	\$20/hour
Business Activities Worksheet	\$150 *	\$500	If we print your emailed docs / CDs	\$30
Employment Expenses Worksheet	\$85 *	\$150	Reprints (if docs are submitted late)	\$15
Capital Gains Worksheet	\$65 *	\$100**		

** only applicable to non YFF investment clients

*** We may charge more depending on complexity and if you did not complete our checklists. We can give you a firm estimate when all documents have been received.**

We expect you to pay when you pick up your return. Cheques are preferred but cash is accepted. Sorry no credit or Debit cards accepted.

When your return is completed, we will contact you to pick up. Complete the following:

- I will pick up my return ___ Call me at _____ or e-mail me at _____
- I want my returned mailed to my home address (there may be a charge if more than \$2.00) _____
- I want my return Express Post to my home address (**\$8 or more** if outside of BC or Alberta) _____

WHY ARE OUR TAX PREP SERVICES SO INEXPENSIVE compared to other tax preparers?

This is an added service to our investment clients. Help us to keep this service inexpensive by completing all checklists that relate to your tax return. Thank you!