

2008 YOU FIRST Financial Tax Service

For New Tax Clients

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 at this point 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: _____ Date of Birth (D/M/Y): _____ SIN: _____

Address to use on your Tax Return: _____

Single__ Married__ Divorced__ Common-Law__

Spouse Name: _____ Date of Birth: _____ SIN: _____

Spouse earnings, if we are not doing spouse's taxes [line 236 on tax return] _____

Dependents: Child's name: _____ Date of Birth (D/M/Y): _____ F __ M __ SIN: _____
Child's name: _____ Date of Birth (D/M/Y): _____ F __ M __ SIN: _____

___ T4 (employment income)

___ T4A (other income)

___ T3 (investment income)

___ T5 (investment income)

___ Dec. 31 Investment statement

Showing capital gains

Ask your broker for year end statement

___ T2200 (if employment expenses)

___ **Notice of Assessment** (last tax year)

___ TRSP, TRIF (RRSP/RRIF Income)

___ Support payment received __ taxable or not?

___ Tips \$ _____

___ Commissions not reported on T-Slip

___ Child Tax Benefit Receipts

___ New child in 2007?

- M __ or F __ - SIN: _____

- D.O.B.: M __ D __ Y __

- Name: _____

___ RRSP contributions receipts

___ Child care expenses (daycare name, or name & SIN of babysitter, # of weeks)

___ Tuition receipts

___ Medical receipts for family

(Dental & extended medical premiums also)

___ Donation receipts

___ Public Transit Pass/Receipt

___ Student loan interest statement

___ Union or professional dues receipts

___ Support payment paid __ Taxable or not?

___ Moving Expenses –

Must be submitted with our Moving Expense Checklist

___ Safety Deposit Box \$ _____

___ Tax instalments \$ _____

(Total made for the year)

___ **Were you living in BC on December 31st 2007?**

___ Copy of previous year's return (IMPORTANT)

___ Do you have to make a Home Buyer's Plan repayment?

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!

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