

2017 YOU FIRST Financial Tax Service

For Existing Tax Clients

Please complete this form accurately and in its proper order so we can enter the data into our software in the most efficient way. This saves you money and keeps our tax preparation below market cost. Please bring in this completed checklist along with your tax documents. (Do not email your bookkeeping documents)

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

Name: _____ Spouse Name: _____
DOB (dd/mm/yyyy): _____ Spouse DOB (dd/mm/yyyy): _____
SIN: _____ Spouse SIN: _____
Phone number: _____ Email address: _____
Address (to use on tax return): _____

Are you a Canadian Citizen? Yes: ___ No: _____ Is Spouse a Canadian Citizen? Yes: ___ No: _____
Do you own foreign property or investments with a total cost of more than \$100,000 Canadian? _____

****If we are *not* doing your spouse's taxes, complete:**

Spouse Name: _____ Spouse Earnings (line 236 on tax return) \$ _____
Single ___ Married ___ Divorced ___ Common Law ___ (Give date if status changed in 2016 (dd/mm/yyyy): _____)

___ Notice of Assessment (last tax year)

___ T4 (employment income)
___ T4A (other income)
___ T3 (investment income – Please make sure you have them all)
___ T5 (investment income – Please make sure you have them all)
___ T4RSP, T4RIF (RRSP/RRIF Income)
___ T4OAS, T4AP (retirement income)
___ Union or professional dues receipts
___ T2200 (if employment expenses) *
___ Spousal Support payment paid ___ Tax deductible or not? Yes/No
___ Spousal Support payment received ___ Tax Income? Yes/No
___ Tips \$ _____
___ Commissions not reported on T-Slip \$ _____
___ Child care expenses:
(Daycare name or Name & SIN of babysitter, # of weeks)
___ Child Tax Benefit Receipts
___ New child in 2016:
- M ___ or F ___ SIN: _____
- DOB (dd/mm/yyyy): _____
- Name: _____

___ RRSP contributions receipts
___ December 31st Investment statements: *
(Showing capital gains or losses, Adjusted Cost Base, etc.)
___ Tuition receipts
___ Student loan interest statement
___ Public Transit Pass/Receipt (monthly or weekly only)
___ Donation receipts
___ Medical receipts for family: *
(Dental & extended medical premiums also)
___ Moving Expenses *
___ Rental Expenses *
___ Tax installments:
(Payment amount made for the year and Date – Attach Statement)
___ Do you have to make a Home Buyer's Plan repayment? ___
___ Please apply the excess RRSP to the Homebuyers plan ___
___ Child Fitness Receipt ___ Child Arts Receipt ___
*** MUST BE SUBMITTED WITH OUR FORMS**
___ Sold Property or Principal Residence? Provide purchase price,
sale price, # yrs of ownership, # yrs of principal residence
Were you living in BC on December 31st 2016? _____
If not, where? _____

Here is our 2016 tax year preparation price list (ALL INVESTING CLIENTS WILL HAVE 20% DISCOUNT):

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

	<u>Checklist</u>	<u>NO Checklist</u>		
Basic return	\$67	\$80	Quebec Return	\$150 **
Basic - one T4 only	\$57	\$75		
Medical Expenses Worksheet	\$60 **	\$75	Other forms	\$40 **
Moving Expense Worksheet	\$80 **	\$100	Foreign Income Worksheet	\$60
Rental Income Worksheet	\$160 **	\$200	Extra time	\$60 / hour
Business Activities Worksheet	\$260 **	\$500	If we print your emailed docs / CDs	\$60
Employment Expenses Worksheet	\$130 **	\$150	Reprints (if docs are submitted late)	\$40
Capital Gains Worksheet	\$90**	\$110	GST Return	\$60

**** We may charge more depending on complexity and if you did not complete our forms.** If you require a firm estimate, let us know.

We expect you to pay when you pick up your return. Cheques, cash or Visa are accepted.

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

- I will pick up my return _____
- I want my returned mailed to my home address (\$3.00 or more depending on weight) _____
- I want my return Express Post to my home address (\$12 or \$18 if outside of BC) _____

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!

YOU FIRST Financial & Benefits Consultants Ltd.

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Last update: Feb. 2017