

2017 YOU FIRST Financial Tax Service

For New 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: _____
Address (to use on tax return): _____
Phone number: _____ Email address: _____
Single__ Married__ Divorced__ Common-Law__ (Give Date if status changed in 2016 (dd/mm/yyyy): _____)
**Is this your first Canadian Tax Return? _____
**If yes what exact date did you arrive in Canada? _____
Are you a Canadian citizen? Yes: _____ No: _____ Is your spouse a Canadian Citizen? Yes: _____ No: _____
Do you own foreign property or investments with a total cost or more than \$100,000 Canadian? _____
Dependents: Child's name: _____ DOB (dd/mm/yyyy): _____ F __ M__ SIN: _____
Child's name: _____ DOB (dd/mm/yyyy): _____ F __ M__ SIN: _____

Notice of Assessment (last tax year)

____ T4 (employment income) _____ RRSP contributions receipts
____ T4A (other income) _____ December 31st Investment statements: *
____ T3 (investment income – Please make sure you have them all) _____ (Showing capital gains or losses, Adjusted Cost Base, etc.)
____ T5 (investment income – Please make sure you have them all) _____ Tuition receipts
____ T4RSP, T4RIF (RRSP/RRIF Income) _____ Student loan interest statement
____ T4OAS, T4AP (retirement income) _____ Public Transit Pass/Receipt
____ Union or professional dues receipts _____ Donation receipts
____ T2200 (if employment expenses) * _____ Medical receipts for family: *
____ Spousal Support payment paid _____ Tax deductible or not? Yes/No _____ (Dental & extended medical premiums also)
____ Spousal Support payment received _____ Tax Income? Yes/No _____ Moving Expenses *
____ Tips \$ _____ Rental Expenses *
____ Commissions not reported on T-Slip \$ _____ Tax installments:
____ Child care expenses: _____ (Payment amount made for the Year and Date – Attach Statement)
____ (Daycare name or Name & SIN of babysitter, # of weeks) _____ Do you have to make a Home Buyer's Plan repayment? ____
____ Child Tax Benefit Receipts _____ Please apply the excess RRSP to the Homebuyers plan ____
____ Child Fitness Receipt _____ Child Arts Receipt _____ Sold a 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? _____

*** MUST BE SUBMITTED WITH OUR FORMS
PLEASE BRING A COPY OF PREVIOUS YEAR'S RETURN**

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.

	Checklist	NO Checklist		
Basic return	\$67	\$75	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 (3% charge on Visa). Sorry no Debit cards 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.