ABRAMS & COMPANY 207-33 Roydon Place, Ottawa, ON K2E 1A3

◊ Telephone: 613.224.6808 ◊ Fax: 613.822.5271 ◊ Email: info@abramsaccounting.ca

Name:______ Spouse:______

Did you sell your home in 2017? Please provide the year of acquisition and the proceeds of the sale.

Did you earn any type of income in 2017?	Provide all your "T" slips
□ Did you earn income in 2017 That wasn't reported on a "T" slip?	Provide Details
Did you make tax installments in 2017?	Provide Your final statement from CRA.
Did you have investment income in 2017?	Provide the Complete Annual Tax Package From Your
	Bank or Investment Broker.
Did you earn Foreign income in 2017?	Provide details and, if applicable, a copy of your
	foreign tax return.
□ <u>At anytime in 2017,</u> did you hold foreign property totalling more	Provide the Complete Annual Tax Package From Your
that \$100,000.00 (Canadian). This includes foreign rental properties,	Bank or Investment Broker or details of the holdings.
trusts, investments and foreign bank accounts.	
Did you contribute to your RRSP?	Provide Receipts
Do you have a Tax-Free Savings Account?	Amount contributed in 2017:
Do you wish to Pension Split with your spouse if it proves to be a	Both spouses initial here:
tax advantage?	
Did you pay or receive Spousal and Child Support imposed by a	Ensure we have a copy of the order.
court or written order?	Amount paid/received in 2017:
Were you a first-time homebuyer in 2017?	Provide the purchase documents as well as all related
	purchase expenses.
Did you sell your principle residence in 2017?	
Did you make charitable contributions?	Provide Receipts
Did you have out-of-pocket medical expenses, such as; travel	Provide Receipts. Your pharmacist can provide you
medical insurance premiums and other Non-OHIP medical insurance	with an annual printout for prescription costs.
premiums, eye exams, eye glasses or contacts, dental and other	
medical procedures?	
Did you pay property tax?	Provide Receipts
Did you pay rent?	Provide annual rent, name and address of landlord,
	and the address of the rental unit.
□ Are you a senior (65+) and use public transportation	Provide Receipts
Did you have rental income	Please complete our Rental Income and Expense
	Form.
Were you Self-Employed?	Please ask us for a Self-Employed Forms package or
	provide an electronic version of your bookkeeping.
Did your employer require you to use your own vehicle, have a	Provide a Form T2200 "Declarations or conditions of
home office, or purchase your own supplies for work purposes?	Employment" completed by your Employer.
Do you use public transportation to or from work or school?	Please "Presto" annual printout, your receipts or your
	paper passes.
Did you pay tuition to a post-secondary institution?	Log-in to your online college/university account and
	print out Form T2202A. If your tuition covers
	mandatory public transportation, provide the value of
	the pass.
Did you make payments on your student loan?	Provide "Interest Paid" Receipts

Quebec Residents Only: Did you make energy efficient	Please contact my office for more information.
improvements to your home	

□ For those with Eligible Dependents:

If you are claiming **childcare expenses**, you must provide receipts with the caregiver's name, address and social insurance number or CRA business number (NEQ number in QC).

THIS SECTION IS FOR NEW CLIENTS, CHANGES IN YOUR INFORMATION OR ADDING NEW TAXPAYERS OR DEPENDENTS:

For Yourself:		
Name:	_Address	
Telephone:	Email:	
Social Insurance Number:	Date of Birth:	
Marital Status: 🗆 Married, 🗆 Separated, 🗆 Divorced, 🗆 Widowed, 🗆 Common Law, 🛛 Date of Change:		
New Banking Information: Branch Number	Institution Number Acct Number: 3 Digits Maximum 12 digits	
	ght qualify for a Disability Credit? Please contact our office for a form to be iew the form and will notify you if you are approved for the credit.	

For Spouse or Dependents:		
Name:	_Address	
Telephone:	_ Email:	
Social Insurance Number:	Date of Birth:	
Marital Status: 🗆 Married, 🗆 Separated, 🗆 Divorced, 🗆 Widowed, 🗅 Common Law, 🛛 Date of Change:		
New Banking Information: Branch Number Institution Number Acct Number: 5 Digits 3 Digits Maximum 12 digits		

Other than you or your spouse, please indicate all members of your family that my office will prepare tax returns for:

Please use this section for any responses, additional comments, changes or concerns: