

Personal Income Tax Intake

Year(s) to prepare _____ Date received _____

Name

☐ Mr. ☐ Mrs. ☐ Ms ☐ Miss _____

Phone _____

Email _____

Current Address _____

City _____

Province _____

Postal Code _____

Name of Spouse (if applicable)

☐ Mr. ☐ Mrs. ☐ Ms ☐ Miss _____

Phone _____

Email _____

New Client

Date of birth MM/DD/YYYY _____

Date of birth MM/DD/YYYY _____

SIN# _____

SIN# _____

Marital Status on Dec 31 of year(s) being filed: ☐ single ☐ living common law ☐ married ☐ widowed ☐ separated ☐ divorced

If marital status changed in the tax year(s) being filed, provide date of change MM/DD/YYYY _____

If McNabb Lucuk LLP is not preparing your spouse's return, please provide their taxable income: \$ _____

Note that you might be able to claim your spouse even if they reside outside of Canada. Foreign spouse's worldwide income _____

REQUIRED	You		Spouse	
	Yes	No	Yes	No
In the tax year being filed:				
Do you want to set up or update direct deposit information? If yes, banking info is required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you a Canadian Citizen? If status changed in the tax year provide the date: MM/DD _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If yes, may CRA provide your name, address, birthdate and citizenship to Elections Canada?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you own specified foreign property at any time in the tax year with a total cost of more than \$100,000 CAN?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you own an interest in a foreign affiliate at any time in the tax year(s)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address change/new principle residence: <input type="checkbox"/> Sold or <input type="checkbox"/> Converted to rental property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you dispose of rental property or rights to purchase a property in the tax year(s).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claim Northern Residence Deduction <input type="checkbox"/> Basic or <input type="checkbox"/> Basic and Additional (lived in a prescribed zone for a continuous period of at least six consecutive months)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claim Northern Residence Travel Deduction (T4 Box 32 amount or NEW in 2021 \$1,200 per person] Complete Page 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you open a First Home Savings Account (FHSA) in the tax year(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you hold legal title to cash, property, real estate, investments, etc. which belong to someone else? If yes, you may be required to file a T3 Trust Return for 2023. <i>Examples: Joint titles on your parent's bank account, holding legal title on a house for estate planning purposes, co-signing for your child's mortgage. Detailed letter provided by request.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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INCOME	Yes	No
Employment Income, commissions, employee profit sharing [T4, T4A, T4PS slips]	<input type="checkbox"/>	<input type="checkbox"/>
Covid benefits, repayments [T4A]	<input type="checkbox"/>	<input type="checkbox"/>
Employment insurance, WCB, social assistance income [T4E, T5007 slips]	<input type="checkbox"/>	<input type="checkbox"/>
Pension income [T4A, T4A(OAS), T4A(P), T4RSP, T4RIF slips]	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to split pension, if applicable?	<input type="checkbox"/>	<input type="checkbox"/>
RRSP withdrawal [T4RSP slips]	<input type="checkbox"/>	<input type="checkbox"/>
FHSA withdrawal [T4FHSA slips]	<input type="checkbox"/>	<input type="checkbox"/>
Partnership income [T5013 slips]	<input type="checkbox"/>	<input type="checkbox"/>
Non-registered Investment income, capital gains or losses from disposals [T3, T5, T5008, T5013 slips, annual statements, trading summaries]	<input type="checkbox"/>	<input type="checkbox"/>
Slips from countries other than Canada	<input type="checkbox"/>	<input type="checkbox"/>
OTHER INCOME - NO SLIPS		
Tips, casual labor or services, grants	<input type="checkbox"/>	<input type="checkbox"/>
Foreign income / foreign pensions	<input type="checkbox"/>	<input type="checkbox"/>
Spousal support received (If yes, \$_____)	<input type="checkbox"/>	<input type="checkbox"/>
Cryptocurrencies trading (e.g. bitcoin)	<input type="checkbox"/>	<input type="checkbox"/>
Sale or deemed sale of investments or real estate	<input type="checkbox"/>	<input type="checkbox"/>
FARM INCOME**	<input type="checkbox"/>	<input type="checkbox"/>
RENTAL INCOME**	<input type="checkbox"/>	<input type="checkbox"/>
SELF EMPLOYMENT INCOME (Sole proprietor)** Page 3	<input type="checkbox"/>	<input type="checkbox"/>

EXPENSES	Yes	No
Medical expenses	<input type="checkbox"/>	<input type="checkbox"/>
Donation receipts (Registered Charity)	<input type="checkbox"/>	<input type="checkbox"/>
RRSP [Mar to Dec and first 60 days of current year]	<input type="checkbox"/>	<input type="checkbox"/>
Union or professional dues	<input type="checkbox"/>	<input type="checkbox"/>
Interest/carrying charges on investments	<input type="checkbox"/>	<input type="checkbox"/>
Eligible Educator school supplies expense	<input type="checkbox"/>	<input type="checkbox"/>
Tuition fees [T2202 slips]	<input type="checkbox"/>	<input type="checkbox"/>
Tuition credits transferred from child or spouse	<input type="checkbox"/>	<input type="checkbox"/>
Student loan interest	<input type="checkbox"/>	<input type="checkbox"/>
Disability Claim [<i>certificate registered with CRA</i>]	<input type="checkbox"/>	<input type="checkbox"/>
Qualify for first time home buyer	<input type="checkbox"/>	<input type="checkbox"/>
Home Buyer Plan or Lifelong Learning Plan	<input type="checkbox"/>	<input type="checkbox"/>
Child support paid (If yes, \$_____)	<input type="checkbox"/>	<input type="checkbox"/>
Spousal support paid (If yes, \$_____)	<input type="checkbox"/>	<input type="checkbox"/>
Child care expenses (Amounts per child required)	<input type="checkbox"/>	<input type="checkbox"/>
Employment expenses (Form T2200 is required as well as details [logs] for vehicle expenses)	<input type="checkbox"/>	<input type="checkbox"/>
Moving expenses (if at least 40 kms closer to work or educational institution) (Details required)	<input type="checkbox"/>	<input type="checkbox"/>

** If registered for GST, do you want McNabb Lucuk LLP to file the GST Return? ☐ Yes ☐ No

Dependants (Children or other dependants)

Dependants First Name	Dependants Last Name	Date of Birth MM/DD/YYYY	SIN	Relationship	Income

Are any dependants shared custody or not living with you. Yes ☐ No ☐ If yes, please explain _____
Please provide new or updated court documents or custody/agreement documents.

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Self Employment Income

If registered for GST, provide the GST account number _____

Was any income earned from website(s): ☐ Yes ☐ No If yes, what percentage? _____ %

List the website(s): _____

Northern Resident Travel Deduction [T4 Box 32 OR NEW in 2021 \$1,200 Per person in the household]

Did you live, on a permanent basis, in a prescribed northern zone for a continuous period of at least six consecutive months (period can begin or end in the tax year the return is being filed for)? ☐ Yes ☐ No

The maximum deduction that an individual can claim for each eligible trip is the lowest of the amount spent on the trip, the lowest return airfare between Grande Prairie and Edmonton (if your residence is in Grande Prairie) and either the amount in Box 32 or the \$1,200.

You can claim up to two trips that you and each eligible family member took, however, no more than two trips taken by you or an eligible family member can be claimed in total for the year by all taxpayers.

If an individual uses the taxable travel benefit received from employment (Box 32) to calculate a travel deduction in a year, then nobody can use any part of that individual's \$1,200 standard amount to calculate a travel deduction for a trip taken by that individual

***You must retain receipts and documents to support your claim for at least six years**

Destination 1 Furthest destination that can be proven _____

Date departed MM/DD/YYYY _____ Date returned MM/DD/YYYY _____

Family members who were on the trip _____

Hotels and/or camping fees \$ _____ Airfare \$ _____

If driven, we will calculate by using Km's travelled x CRA's rate

Meals will be calculated based on CRA rates and numbers of days on vacation

Destination 2 Furthest destination that can be proven _____

Date departed MM/DD/YYYY _____ Date returned MM/DD/YYYY _____

Family members who were on the trip _____

Hotels and/or camping fees \$ _____ Airfare \$ _____

If driven, we will calculate by using Km's travelled x CRA's rate

Meals will be calculated based on CRA rates and numbers of days on vacation

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Destination 3 Furthest destination that can be proven _____

Date departed MM/DD/YYYY _____ Date returned MM/DD/YYYY _____

Family members who were on the trip _____

Hotels and/or camping fees \$ _____ Airfare \$ _____

If driven, we will calculate by using Km's travelld x CRA's rate

Meals will be calculated based on CRA rates and numbers of days on vacation

Destination 4 Furthest destination that can be proven _____

Date departed MM/DD/YYYY _____ Date returned MM/DD/YYYY _____

Family members who were on the trip _____

Hotels and/or camping fees \$ _____ Airfare \$ _____

If driven, we will calculate by using Km's travelld x CRA's rate

Meals will be calculated based on CRA rates and numbers of days on vacation