

**McNabb Lucuk Personal Income Tax Intake**

**YEAR(S):** \_\_\_\_\_

**Date Received:** \_\_\_\_\_

**Name: Mr, Mrs, Ms, Miss** \_\_\_\_\_ **Spouse: Mr, Mrs, Ms, Miss** \_\_\_\_\_

**Telephone number:** \_\_\_\_\_ **Telephone number:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Current address:** \_\_\_\_\_

**NEW CLIENT - Date of Birth:** \_\_\_\_\_ **Spouse's - Date of Birth:** \_\_\_\_\_

**- SIN #:** \_\_\_\_\_ **- SIN #:** \_\_\_\_\_

**Marital Status as of Dec 31 of year(s) being filed:** single, living common law, married, widowed, separated or divorced

If there was a change in marital status, in the tax year(s) being filed, date of change \_\_\_\_\_

Do you need to set up or update direct deposit information?  Yes  No *If yes, please provide your banking information*

Are you a Canadian Citizen?  Yes  No

Provide information to Elections Canada?  Yes  No

Do you own foreign property/investments with a total cost of more than \$100,000 CAN?  Yes  No

Did you receive interest, dividends (T5), or benefits from a business in which a relative is a key party (ownership or involvement)? If yes, more information will be required.  Yes  No

**Did you dispose of your principle residence in the tax year(s) being filed?**  Yes  No **Year of disposal?** \_\_\_\_\_

**Did you have a change-in-use of your principle residence** (eg. converted to a rental property)?  Yes  No

	Yes	No
Spouses or dependents with T1's not prepared by McNabb Lucuk LLP		
Tax installments		
Claiming northern residence deduction <ul style="list-style-type: none"> <li><input type="checkbox"/> Basic?</li> <li><input type="checkbox"/> Additional?</li> </ul>		
Claiming northern residence deduction travel (have box 32 on T4)		

<b>Self-employment income (sole proprietor)</b>	
<input type="checkbox"/> Earned income from websites?	Yes No
<input type="checkbox"/> Percentage of income earned from websites? _____	
<input type="checkbox"/> Primary websites: _____	
<input type="checkbox"/> If registered for GST, who is to file it? MLLLP or Bookkeeper	

<b>INCOME</b>	Yes	No
Rental income		
Farm		
Investment portfolio for non-registered		
Capital gains or losses on investments		
Investments in digital currency (ex: bitcoin)		
Spousal support received		
Other income/tips		
Do you want to split pension if applicable?		

<b>EXPENSES</b>	Yes	No
Employment expenses (must include form T2200 and if you have vehicle expenses, someone will be contacting you for more information)		
Union or professional dues		
Medical expenses		
Donation receipts		
Spousal support paid		
Child support paid		
Child care expenses		
Qualify for first time home buyer		
Have a Home Buyer Plan or a Lifelong Learning Plan		
Disability certificate registered with CRA		
Home accessibility expenses (if eligible for disability tax credit or are 65 years of age or older)		
Interest/carrying charges in investments		
Moving expenses		

Circle applicable slips received/expected			
T3	T4	T4A	T4A(OAS)
T4A(P)	T4E	T4RIF	T4RSP
T5	T5007	T5008	T5013
RRSP (Mar-Dec/19)	RRSP (1st 60 days of 2020)	T2202A (Tuition)	
Tuition credits transferred from child or spouse	Yes	No	

**Dependents** (children or other dependents):

Dependent's first name	Dependent's last name	Date of birth	Social Insurance Number	Relationship