



Name:

Address:

Telephone:

(Work)

(Cell)

(Evening)

Email:

Please advise delivery method for your completed T1 package: mail courier pick-up electronic

Any future personal tax correspondence please send: electronic paper

Review and indicate if applicable:

Slip	Income	Yes		No		Expenses / Credits	Yes		No	
T3	Mutual funds & trusts <i>(often received in April)</i>					Employment expenses <i>(include Employer Signed Form T2200)</i>				
T4	Employment Income					Union or Professional Dues				
T4A	Other Income					Medical expenses **Pharmacy summary required**				
T4A(OAS)	Old Age Security					Tuition/Education Certificates **Include Form T2202A**				
T4A(P)	Canada or Quebec Pension					Donation receipts				
T4RSP	RRSP					Child care expenses				
T4RIF	RRIF					Children's fitness receipts – Phased out in 2017				
T4E	Employment Insurance					Children's art receipts– Phased out in 2017				
T5	Interest and dividends					RRSP contributions				
T5013	Partnership income <i>(often received in April)</i>					Alimony / child support paid				
RC62	Universal child care benefit					Investment fees / interest / carrying charges				
	Rental income / expenses					Moving expenses				

Self-employment income / expenses	Public Transit Passes
Capital gains or losses on investments (these are not included on t-slips)	Home accessibility expenses (seniors / disabled)
Alimony / child support received	Other expenses / credits (please specify)
Other Income	
Other	Yes No
T2201 Disability Tax Credit Certificate	
Spouse or dependent's T1's not prepared by KRP	
Living common-law	
Change in marital status	

I am (we are) Canadian citizens and authorize Canada Revenue Agency ("CRA") to provide my (our) name(s), address, date(s) of birth and citizenship(s) to Elections Canada to update my (our) information on the National Register of Electors"

YES **NO** **IF NOT COMPLETED, YOUR RETURN WILL INDICATE NO.**

FOREIGN INFORMATION

Did you spend time in the United States? Individuals spending a significant amount of time in the U.S. might be required to file with the IRS. Not filing in the U.S. when required could incur **substantial penalties**. Please provide the number of **working days** and the number of **vacation days** spent in the U.S. in 2017 2016 2015

- Are you a U.S. Citizen or Green Card Holder?** **Yes** **No**

U.S. Citizens/Green Card Holders are required to file U.S. tax returns annually whether or not they reside in the U.S. You may be considered a U.S. Citizen if either of your parents were U.S. Citizens. Please advise if you need any assistance in determining or dealing with your U.S. filing requirements.

- Are you a beneficiary of a foreign trust or estate?** **Yes** **No**
If yes, please provide details below or if not enough space is provided please attach a separate sheet.

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- Did you receive any foreign pension payments?** **Yes** **No**

If yes, please provide details below or if not enough space is provided please attach a separate sheet.

FOREIGN INCOME VERIFICATION STATEMENT (T1135)

- **Do you have assets outside of Canada?** **Yes** **No**

Canadian residents are required to report all income earned, including income from foreign sources. Please provide details of any foreign income, including any taxes paid to the foreign country. Many foreign assets need to be disclosed separately as outlined in the attached document “*What foreign property do I have to report?*” **You must report** even foreign securities held in Canadian investment accounts. Your investment advisor may have provided useful information in this regard. **Substantial penalties** apply if this disclosure is not properly completed – please err on the side of caution and ask us about any assets you are unsure of.

Please provide names and contact information for all personal advisors (investment advisors, lawyers, other accountants, etc.) that KRP may be required to contact in the preparation of your 2017 income tax return(s):

Family Profile

Please complete the following information to ensure you are receiving all available benefits / credits for your children and disability tax credits.

Child’s First Name	Child’s Last Name	Date of Birth	S.I.N. (if applicable)
Yes No	Are you disabled ? Please inform us if any of your dependent children are disabled . Provide a completed Form T2201 – Disability tax credit certificate.		
Yes No	Please let us know if you provided in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependent relative (include relatives such as grandchildren, brothers, sisters, aunts, uncles, nephews or nieces).		

RECEIVING ALL YOUR TAX INFORMATION AT ONCE HELPS LOWER FEES