

# SWAIN & ASSOCIATES

## CHARTERED ACCOUNTANTS INC.

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### **PERSONAL TAX INFORMATION**

Name: \_\_\_\_\_ Taxation Year: \_\_\_\_\_  
Address: \_\_\_\_\_ SIN: \_\_\_\_\_  
\_\_\_\_\_ Birth Date: \_\_\_\_\_  
\_\_\_\_\_ Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_ Cell phone: \_\_\_\_\_  
Marital Status: \_\_\_\_\_ Dependents \_\_\_\_\_  
Spouse's Name: \_\_\_\_\_

### **Checklist for Most Common Tax Matters**

*Help us to help you minimize your taxes*

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- T4 Employment Income
- Other Employment Income
- Tips and Gratuities
- T4(OAS) Old Age Security
- T4A(P) Canada or Quebec Pension Plan
- Other Pensions
- T4(E) Employment Insurance Benefits
- T5 Interest or Dividends
- T3 Trust or Estate Income
- RC62 Universal Child Care Benefit
- T4RSP RSP Income
- Scholarships/Bursaries
- Rental Income and Expenses
- Capital Gains or Losses
- Disposition of Real Estate
- Foreign Assets
- Other Income
- Current Year Instalments \$ \_\_\_\_\_
- Recent Assessment or Reassessment Notices

Notes:

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Please note that this list is not inclusive and is to be used only as a guide, contact us with any questions regarding the above