

# Tax Preparation Information Sheet



A Division of  
Business Innovation Group Inc.

Name:		SIN:			
Identification #		DOB:			
Address:					
Email:		Phone:			
Citizenship:		Date of Change:			
Marital Status:		Date of Change:			
Spouse Name:		DOB:			
SIN:		Income-if we don't do return:			
<b>Dependents</b>					
Name:		DOB:		SIN:	
Name:		DOB:		SIN:	
Name:		DOB:		SIN:	
Name:		DOB:		SIN:	
Do Dependents live with you:	Yes	No			
Daycare fees:	Yes	No			
If Yes name of Daycare and if Dayhome name and SIN of Caregiver:					
Do you have any income that is exempt under the Indian Act?	Yes	No			
At any point in 2023 were you the legal owner (your name on title) of an asset held in your corporation?	Yes	No			
At any point in 2023 was a corporation the legal owner (on title) of your real estate, vehicle, or other asset?	Yes	No			
At any point in 2023 were you the legal owner (your name on title) of someone else's real estate, vehicle or other asset?	Yes	No			
<b>Northern Residence:</b>	Yes	No			
Box 32 on T4 - Travel in Prescribed Zone:	Yes	No			
If Yes Travel Details:					

Trip 1					
Dates:					
Who Went:					
Where to:					
Any expenses: plane tickets, gas receipts, meals, hotel		Yes	No		
Trip 2					
Dates:					
Who Went:					
Where to:					
Any expenses: plane tickets, gas receipts, meals, hotel		Yes	No		
Types of slips					
T4		T4E		RRSP	
T5		RC62		RSP	
T3		T2202A - Tuition		Donations	
T4A		T4RSP		Union Dues	
T4AP		T4RIF		Apprenticeship	
T4OAS		T5007		Tips	
Medical receipts		Yes	No		
First-time Home Buyers		Yes	No		
Rental Income		Yes	No		
Self-employment income		Yes	No		
Farming income		Yes	No		
NOA		Yes	No		
Do you own Foreign Property		Yes	No		
<p>To the best of your knowledge, you have provided us with all the required paperwork to do your Personal T1 Tax Return and as such Advantage Bookkeeping &amp; Business Consulting is not responsible for missing information or changes to your tax return. I have authorized Advantage Bookkeeping to process and efile my tax return.</p>					
Clients Name:					
Clients Signature:				Date:	