

WFS Inc T1 Tax Interview Guide – Name: _____

Things we need to know, even if it doesn't seem that anything has changed.	First time filing a Canadian tax return? Yes <input type="checkbox"/> No <input type="checkbox"/> Are you a Canadian Citizen? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes – provide information to Elections Canada? Yes <input type="checkbox"/> No <input type="checkbox"/> Do you qualify for the Fire Fighter/Rescue Credit? Yes <input type="checkbox"/> No <input type="checkbox"/> Own Foreign property costing more than \$100,000? Yes <input type="checkbox"/> No <input type="checkbox"/> Did you sell your primary residence during the year? Yes <input type="checkbox"/> No <input type="checkbox"/> If "Yes" Complete Form T2091
Separation, divorce and child or spousal support	If separated or divorced for the entire year did you receive or pay support? Yes <input type="checkbox"/> No <input type="checkbox"/> Child support \$_____ Spousal support \$_____ Spousal information required if paying or receiving spousal support: Spousal name _____ SIN _____ - _____ - _____
Dependant file	Dependent children or other dependants? Yes <input type="checkbox"/> No <input type="checkbox"/> Child under 18 – Did you receive UCCB? Yes <input type="checkbox"/> No <input type="checkbox"/> If single parent, designate UCCB to child? Yes <input type="checkbox"/> No <input type="checkbox"/> Child turning 19 before April of 2017? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, file return for dependant to be eligible for GST credit
Child care expenses	Child under 16 (or 16 and over if disabled): <input type="checkbox"/> Child care expenses? (daytime <input type="checkbox"/> or, overnight <input type="checkbox"/>
Disability/Infirmary	Personal disability or infirmity? Yes <input type="checkbox"/> No <input type="checkbox"/> Dependant disabled or infirm? Yes <input type="checkbox"/> No <input type="checkbox"/> Disability on file with CRA? Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="checkbox"/> Taxpayer's first year of claim or transfer? <input type="checkbox"/> Dependant's first year of claim or transfer?
Employment income (T4)	<input type="checkbox"/> T4 Income from employment? <input type="checkbox"/> Tips \$_____ <input type="checkbox"/> Casual labour \$_____ <input type="checkbox"/> <input type="checkbox"/> T4 – Boxes 78 to 83 require business statement <input type="checkbox"/> Eligible retiring allowance? <input type="checkbox"/> RRSP or RRIF receipt for transfer?
Are you Self Employed?	If you are GST registered do you want us to file your GST return? Yes <input type="checkbox"/> No <input type="checkbox"/> Did you purchase major assets in the tax year? Yes <input type="checkbox"/> No <input type="checkbox"/> Do you require bookkeeping services? Yes <input type="checkbox"/> No <input type="checkbox"/>
Other income – Investments	<input type="checkbox"/> Investment income (not on a slip)
Other income – Capital gains	<input type="checkbox"/> Disposition of capital property (not on a slip)
Other income – Business	<input type="checkbox"/> Business/professional income <input type="checkbox"/> Income from farming or fishing <input type="checkbox"/> Rental income
Other income – Foreign income	<input type="checkbox"/> Foreign income Type _____
RRSP	<input type="checkbox"/> RRSP contributions? Deduction limit from CRA \$_____
Carrying charges, Investment expenses	<input type="checkbox"/> Investment management Fees <input type="checkbox"/> Accounting fees <input type="checkbox"/> Investment Loan interest <input type="checkbox"/> Carrying charges pertaining to investment income qualifying for deduction? <input type="checkbox"/> Legal fees for support payments <input type="checkbox"/> Other
Home Buyers' Plan or Lifelong Learning Plan	<input type="checkbox"/> HBP? Required repayment \$_____ <input type="checkbox"/> LLP? Required repayment \$_____ <input type="checkbox"/> HBP - withdrawal amount \$_____ <input type="checkbox"/> LLP - withdrawal amount \$_____ <input type="checkbox"/> Date of withdrawal _____ <input type="checkbox"/> Date of withdrawal _____

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Home Buyers' Amount	<input type="checkbox"/> Home bought in tax year qualifying for the first-time home buyers' amount? <input type="checkbox"/> Home owned jointly? With Co-Owner or Spouse?
Tuition Fees	<input type="checkbox"/> Tuition fees? Did taxpayer or any family member attend post-secondary education? (T2202A slip) Carry forward amounts: Federal \$_____ Provincial \$_____ <input type="checkbox"/> Scholarship income? <input type="checkbox"/> Student loan interest? <input type="checkbox"/> Any unclaimed amounts from previous 5 years? <input type="checkbox"/> Tuition transfer within provinces? <input type="checkbox"/> Tuition not on a slip? <input type="checkbox"/> Inter-Provincial tuition transfer?
Medical expenses	<input type="checkbox"/> Family medical expenses? <input type="checkbox"/> Any unclaimed amounts from previous years? (Req T1Adj) <input type="checkbox"/> Long-term care? <input type="checkbox"/> Attendant care?
Donations and gifts	<input type="checkbox"/> Charitable donations? <input type="checkbox"/> Any unclaimed amounts from previous 5 years?
Political contributions	<input type="checkbox"/> Federal political party contributions? <input type="checkbox"/> Provincial political party contributions?
RPP deduction	<input type="checkbox"/> RPP contributions not reported on a slip?
Other deductions	<input type="checkbox"/> Professional fees or Union dues on a receipt? <input type="checkbox"/> Professional fees or Union dues not on a receipt? <input type="checkbox"/> GST/HST recorded on a Professional fees receipt?
Moving expenses	<input type="checkbox"/> Moving expenses in the tax year? <input type="checkbox"/> Any unclaimed amounts from the previous year qualifying for deduction?
Employment expenses	<input type="checkbox"/> Employment expenses (T2200 or TL2)? <input type="checkbox"/> Tradesperson incurring tool expenses? <input type="checkbox"/> Expenses qualifying for GST/HST rebate?
Employment income (T4) expenses and other deductions	<input type="checkbox"/> Legal fees incurred to collect salary or wages? <input type="checkbox"/> Legal fees paid re: retiring allowances, income tax or EI appeals, etc.?
Northern resident deduction	<input type="checkbox"/> Basic deduction? <input type="checkbox"/> Additional deduction? <input type="checkbox"/> Travel expenses? Address of residence _____
Instalments and deductions at source	<input type="checkbox"/> Instalments paid for the tax year? Amount \$_____

Do you want to start or change Direct Deposit of refund into your bank account? This includes Income Tax Refunds, GST Credits, Canada Child Tax Benefits or Working Income Tax Benefits.

If YES, please provide the following information or attach a VOID cheque:

Branch Number: _____

Institution Number: _____

Account Name: _____

Institution Name: _____

Account number: _____

I authorize Wise Financial Services Inc to prepare my _____ Personal Income Tax Return, as well as for those listed as Spouse and/or dependents, if applicable.

Print name

Signature

Date