

# CONFIDENTIAL

10430 144 Street, Surrey, BC V3T 4V5  
T. 604.581.9121 F. 604.581.9142  
TF 1.800.397.0115  
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MACNAUGHTON & WARD  
FINANCIAL SERVICES LTD

## T1 CLIENT INFORMATION FORM

For office use only

### 1. PERSONAL INFORMATION

Name		Social Insurance #	Date of Birth	Phone (Business)
Taxpayer				
Spouse				
Address				Phone (Residence)

Marital Status:  Married  Single  Common-law  Separated  Divorced  Widowed

If married or common-law, should your tax return be filed jointly with your spouse's return?  Yes  No

Do you have access to the internet or email?  Yes  No  
If yes, provide your email address: \_\_\_\_\_

Would you like to subscribe to our bi-weekly financial services newsletter delivered via email?  Yes  No

Do you authorize Macnaughton & Ward Financial Services to contact you with promotions, special offers, or products that we determine may be of interest to you and/or your family members?  Yes  No

### 2. ELECTIONS CANADA

The taxpayer authorizes the CRA to provide their name, address, and date of birth to Elections Canada to update their information on the National Register of Electors.  Yes  No

### 3. FOREIGN REPORTING

The taxpayer owned or held foreign property with a total cost of more than \$100,000 CA at any time throughout the year.  Yes  No

### 4. CHANGE IN PERSONAL OR FINANCIAL SITUATION DURING THE YEAR

Did the taxpayer's marital status change during the year?  Yes  No

Did the taxpayer immigrate to Canada or emigrate from Canada during the year?  Yes  No  
If yes, provide date of entry into Canada \_\_\_\_\_ or date of departure \_\_\_\_\_

Did the taxpayer become deceased during the year? If yes, provide date of death \_\_\_\_\_  Yes  No

Did the taxpayer become bankrupt during the year?  Yes  No

Did the taxpayer refinance a business with new or revised debt?  Yes  No

Did the taxpayer close a bank account or investment account?  Yes  No  
If yes, provide details: \_\_\_\_\_

### 5. DEPENDANTS

Name	Relationship	Social Insurance #	Date of Birth	Income	Disabled?

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### 6. EMPLOYMENT INCOME / DEDUCTIONS

- Did the taxpayer earn income from employment?  
 If yes, are T4 slips attached?  Yes  No  
 Yes  No
- Did the taxpayer receive employment insurance?  
 If yes, are T4E slips attached?  Yes  No  
 Yes  No
- Did the taxpayer receive taxable benefits not shown on the T4 slips?  Yes  No
- Did the taxpayer receive any employment income in the form of commission?  Yes  No
- Did the taxpayer receive a GST rebate?  
 If yes, amount received \_\_\_\_\_  Yes  No
- Did the taxpayer pay union / professional dues?  
 If yes, provide details \_\_\_\_\_  Yes  No
- Is the taxpayer claiming deductible employment expenses?  
 If yes, is a signed T2200 attached?  Yes  No  
 Yes  No
- Does the taxpayer participate in an employee profit sharing plan?  
 If yes, are there T4PS slips attached?  Yes  No  
 Yes  No

### 7. PENSION INCOME

- Did the taxpayer receive pension income?  
 If yes, are the appropriate T slips attached?  Yes  No  
 Yes  No
- Old Age Security (T4 OAS)     CPP/OPP T4A (P)     Pension T4A     RRSP /RPP /RRIF /T4RSP /T4RRIF

### 8. INVESTMENT INCOME / DEDUCTIONS

- Did the taxpayer earn any investment income?  
 If yes, are the appropriate T slips attached?  Yes  No  
 Yes  No
- Interest (T5 /T600)     Dividends (T5)     Estate /Trust (T3)     Partnership /Tax Shelters (T101 /T5013)

Did the taxpayer dispose of any property during the year? If yes, provide the following information?

Description of Property	Date Acquired	Date Disposed	Sale Proceeds	Cost	Expenses

### 9. SELF-EMPLOYMENT / BUSINESS INCOME

- Was the taxpayer self-employed during the year?  
 If yes, are the appropriate self-employment statement(s) attached?  Yes  No  
 Yes  No
- If an owner/manager, did the taxpayer have a shareholder loan outstanding during the year?  
 If yes, provide details of borrowings and repayments: \_\_\_\_\_  Yes  No  
 Yes  No

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### 10. RENTAL INCOME

Did the taxpayer have any rental income?  Yes  No  
If yes, is a statement of rental income attached?  Yes  No

### 11. RRSP CONTRIBUTIONS

Did the taxpayer make an RRSP contribution during the year?  Yes  No  
If yes, is the T slip and any other documentation attached?  Yes  No

Name of RRSP Contribution: \_\_\_\_\_  Own RRSP  Spousal RRSP

### 12. OTHER INFORMATION

Is there a tuition/education amount for the taxpayer?  
If yes, are the appropriate T slips attached?  Yes  No  
 Yes  No

If there a tuition/education amount claimed on transfer from a dependant?  
If yes, are the appropriate T slips attached?  Yes  No  
 Yes  No

Did the taxpayer pay any interest on a student loan?  
Are the appropriate details disclosed in an attached schedule?  Yes  No  
 Yes  No

Did the taxpayer have any childcare expenses claimed?  
Are the appropriate documents attached?  Yes  No  
 Yes  No

Did the taxpayer have any medical expenses claimed?  
Are the appropriate documents attached?  Yes  No  
 Yes  No

Did the taxpayer have any charitable donations claimed?  
Are the donation slips attached?  Yes  No  
Are any charitable donations made by way of gifting an item in-kind?  Yes  No  
Are there any loans associated with the charitable donation?  Yes  No

Did the taxpayer have any political contributions claimed?  
Are the donation slips attached?  Yes  No  
 Yes  No

Did the taxpayer pay any income tax by instalments?  
If yes, has the taxpayer provided information on the amount paid?  Yes  No  
 Yes  No

### 13. PRIOR YEAR TAX RETURN INFORMATION / CORRESPONDENCE

Is a copy of last year's tax return attached?  Yes  No  
Is a copy of the Notice of Assessment for last year's tax return attached?  Yes  No

Are you a new client of the firm?  
If yes, are tax returns for the last 3 years attached with corresponding Notice of Assessments?  Yes  No  
 Yes  No

Other than the Notice of Assessment for your tax return, did you receive any other correspondence from the Canada Revenue Agency throughout the year?  
If yes, is this documentation attached?  Yes  No  
 Yes  No