



Phone: 416-817-6818
Email: info@newlinecommerce.com
Web: newlinecommerce.com

First Name: Last Name: Gender: M F
Date of Birth: SIN: Marital Status:
(YYYY/MM/DD)
Phone: Email:
Address:
Please include apt#, city, province, and postal code
If your Address has changed since your last tax year, indicate the date changed and the new Address:
New Address: Date Moved:
Are you a Canadian Citizen? Date Arrived In Canada:
Rent Amount: Months of Rent: Landlord Name:
Void Cheque: Transit #: Institution #: Account #:

Spouse or Common-Law Partner's Information (if applicable)

Are we preparing your spouse's or common-law partner's tax return?
If not, please indicate his or her net income (line 236 from their tax return):

First Name: Last Name:
SIN: Date of Birth
(YYYY/MM/DD)

Are you a Canadian Citizen:
If you got married during the year, please indicate the date of change:

Dependant(s) Information (if applicable)

First & Last Name	Date of birth (YYYY/MM/DD)	S.I.N (if applicable)	Net Income (if applicable)

Other Information

If this is your first year working with us, please provide us with your most recent Notice of Assessment

Did you own foreign property at any time during the tax year where the total value of the property exceeded \$100,000 CAD? *(This includes foreign shares held in Canadian trading accounts)*

YES
NO

Did you move 40 km or more to be closer to your new work, business location or school during the tax year?

YES
NO

Did you sell your principal residence during the tax year?

YES
NO

Do you and/or your spouse (or partner) pay property taxes and/or rent?

YES
NO

If you answered Yes to any of the above questions above, your Tax Hero will be following up with additional questions.

TAX SLIP CHECKLIST - CHECK ALL THAT APPLY

Personal Income

T4, T4A, - Salaries, Employment, Pension

Other Employment Benefits

T4E - Employment Insurance Benefits

T4A(P) - CPP Benefits

T4(OAS) - Old Age Security Benefits

T4RIF - RRIF Income

T5007 - Social Services Benefits

Home Buyers' Plan

T4RCA – Retirement Income

Other Income

Alimony Received

Professional/Business Earnings

Investment Income

T3, T5, and T4PS - Interest and Dividends

Interest on Tax Refund

Rental Income*

T6000 - Canada Savings Bonds

T3 - Income from Mutual Funds

Net Partnership Income (Loss)

Capital Gain/Losses

T5008 - Statement of Security Transactions

Scholarship/Bursaries

Other - Specify

Non-Refundable Credits

Charitable Donations

Medical Receipts

Political Contributions

First-Time Home Buyer

Interest Paid on Student Loans

Disability Deductions

Family Caregiver - supported dependant with physical/mental impairment

T2202 - Tuition Fees for yourself, your partner, and/or your dependant

Deductions

RRSP Receipts

T2200 - Declaration of Condition of Employment

Professional (or Union) Dues

Non-Capital Losses Carryforward

Alimony Paid

Capital Losses Carryforward

Attendant Care Expenses

Allowable Business Investment Loss

Childcare expenses (daycare, camp, babysitting)

Moving Expenses*

Interest Carrying Charges on Investments

TL2 - Claim for Board and Lodging Expenses

Investment Counsel/Accounting Fees

Limited Partnership Losses of Other Years

Employment Expenses

Deductible Legal Fees

E.I. Repaid

When finished, please save this form to your computer, and attach this to your booking under "Individual Tax Information Checklist" when you file.

If you have more information, such as more rent in different locations, please indicate in your email.

Any questions please contact us via e-mail: info@newlinecommerce.com

THANK YOU!

