Name:	Spouse:
Date of Birth: Address:	Date of Birth:
Address: Phone: (Home)	Dependent Children S.I.N. Date of Birth
(Office)	
(Cell)	
Fax:E-mail:	
Did you become (or cease to be) a resident of Canada in 2017?	Yes [] No [] Date of entry/departure:
Elections Canada	Efile/Email Option
Are you a Canadian citizen? Yes [] No []	If possible, do you want your tax return electronically filed with
Can we provide CRA your name, address and	CRA? Yes [] No []
date of birth to Elections Canada? Yes [] No []	Would you prefer to receive your copy of your 2017 personal
	income tax in PDF format via email? Yes [] No []
	ncome (provide slips, documents or details)
Employment (T4) [] Taxable benefits not on T4 []	Year End Trading Summaries / Gain & Loss Reports for 2017 []
	(For statements that only provide proceeds on sale, please obtain
Stock options exercised or shares sold (provide listing) Self-employed commission income	the original cost/average cost information from your broker.)
Employment insurance (T4E)	Business/professional income/expenses []
Pension/retiring allowance (T4A)	Rental income & expenses (summarized by property)
CPP/OAS (T4A(P)/T4A(OAS))	Farming/fishing income/expenses []
RRSP, DPSP, RPP, RRIF (T4RSP/T4RIF)	Alimony/maintenance received []
Dividends (T5)	Other sources of income:
Interest (T5)	Cryptocurrency Transactions []
Mutual funds/estates/trusts (T3)	[]
Partnerships/tax shelters (T5013/T101)	2016 Notice of Assessment/Prior Year Reassessment(s) []
Deductions and Credits (pro	vide receipts, documents or details)
RRSP contributions []	Deductible employment expenses []
Union/professional dues []	Tuition fees/education amount (ONLY the T2202 is required)[]
Child care expenses & Adoption expenses []	Interest paid on student loans []
Moving expenses (copies of receipts)	Charitable donations/Political contributions []
Alimony/maintenance paid []	Educator School Supplies []
Accounting/legal/investment counsel fees []	Interest paid on investments []
First Time Home Buyers Credit []	Public Transit See Page 2
2017 Total Quarterly Tax Installments Paid \$	Medical/attendant care expenses
Spouse's net income ¹ \$	
	(Please do <u>not</u> submit individual drug receipts, but obtain an
Health Plan Premiums paid by employee/deducted on pay stub	annual summary from your pharmacist)
(Per December 31, 2017 Pay Stub) \$	Please itemize trips and distance traveled for out-of- town medical services obtained. See Page 2
	bet rices obtained.

Note: Individuals with spouses or common-law partners who earn income eligible for the pension income tax credit may reduce their overall tax bill through the pension income splitting measure. If we determine that all conditions have been met and the measure is beneficial, would you like to make the election?

Yes [] No []

Note: Through a matching program of tax information slips, the CRA is imposing harsh penalties for unreported income. Please provide us with any late or amended tax slips (i.e. slips received after sending package to us) to avoid exposure to penalties.

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Provide only if we're not preparing his/her income tax return. Indicate if your spouse was self-employed during the year. Yes [] No []

MEDICAL TRAVEL SUMMARY

Patient:	Date	From:	To:	# kms (Note 1)

NOTE 1: Travel must be greater than 40kms (one-ways)	ay) to make a claim.
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Did you dispose of a property (or properties) in 2017 for which you are claiming a principal residence exemption	1?
Yes [] No []	

Foreign Reporting (If "Yes", please provide details)			
At any time in 2017, did you own foreign property with a cost greater than \$100,000? At any time in 2017, did you transfer or loan property or funds to a non-resident trust? Own more than 10%	Yes [] No []		
of the shares of a foreign corporation?	Yes [] No []		
Are you or your spouse a U.S. citizen or green card holder?	Yes [] No []		
Investments in Foreign Entities (If "Yes", please provide details)			
On or after January 1, 2017, did you own an interest in any form of non-resident entity?	Yes [] No []		
On or after January 1, 2017, did you own an interest in an insurance policy that was issued by a foreign entity?	Yes [] No []		

Real Estate Located in the United States (Provide the detail if, at any time during the year, you owned U.S. real estate)	

Other Comments or Information		