



Personal Tax Package



Canadian & US Personal
Taxes, Small Business
Estate and Trust
Returns



Two Locations to serve Clients:

Tecumseh Office:

12122 Tecumseh Road East Tecumseh Ontario N8N1L9

Amherstburg Office:

114 Murray St Amherstburg, ON N9V 1H9

Telephone **519 727- 7777**

Email

7thwavefinancialsolutions@gmail.com

Visit us at: **7thWaveTaxSolutions.com**

For additional forms and details

It's Tax Time...

This personal tax package and questionnaire is to assist you in gathering all the documents and information necessary for the preparation of your tax return.

Please carefully complete our revised questionnaire, it is very important that **all** the questions are answered on our questionnaire.

Fill in a separate questionnaire for each person filing a return in your family (note that dependents 17 years and older should be filing to get the HST credit and trillium grant).

If you need extra copies of this or other information, please visit the tax section of our website at:

7thwavetaxsolutions.com

If you are a new tax preparation client, please ensure you provide us with a copy of last year's return and notice of assessment.

Please ensure you provide us with all your slips and summaries as well as any documentation (receipts documents etc).

U.S. tax Clients: Please drop off your **W2 forms as soon as they are received in January or February.** We will do the US returns early which will allow time for tax planning. If you do not have your Canadian slips, don't worry, we will do your US return and wait until you have your Canadian slips. Remember, your 1040NR is due by NLT 15 April if you are a visa holder.

Canadian Clients: Please drop off as soon as you feel you have all your slips. If missing anything just let us know

Last Call: Please drop your documents off by no later than April 7th to ensure we have time to prep your return.

US filers: please drop off your documents by no later than 10 March.

If you are planning on emailing us your tax documents, please attach all documents in **one email** we will confirm receipt of your email.

Hours of Operation

See our google listing for HOURS of Operation:

Visit us on the web at:

7thWaveTaxSolutions.com

You can reach our office at:

519-727-7777

Income

- Employment and EI (T4 T4E T4A)
- Investments (T3 T5 T5008)
- OAS and CPP (T4AP and T4OAS)
- Pensions (T4A)
- Social Assistance & WSIB (T5007)
- All other slips (if your missing slips let us know!)

Receipts

- RRSP contribution slips
- Child support paid or received
- Professional or union dues
- Medical expenses
- Property Taxes or rental amounts (for credit)
- Tool expenses for trades
- Home office/work from home
- Charitable donations
- Childcare or Camps
- Adoption expenses
- Moving Expenses
- Employment expenses
- Tuition (T2202A)
- Interest on Student Loans
- Exams for professional certs.

Other Documents

- Notice of Assessments
- Last years returns (if a new client)
- Information on sale of real estate (principal home or rental or vacation)
- Sale of stocks or other investments
- Declaration of condition of employment (T2200 or T777)
- Rental or Business income (**see our website for questionnaires, this is required**)



Dropping Off

**Please drop your documentation off at
-either of our two locations on the
cover sheet of this package-**

or

If you need to drop items off after hours

**Please use the secure mail slot
(note: do not drop off to the old address
Blanchard Park see cover page for
current addresses)**



Personal Data:

Full legal Name _____

Address _____ _____
Postal code _____.

DID YOUR ADDRESS CHANGE FROM LAST YEARS RETURN?

YES ___

Preferred contact number : _____ is this a cell ___

Email address: _____

By providing an email you consent to us contacting you electronically

SIN # _____ - _____ - _____

Date of Birth: Day _____ Month _____ Year _____

Marital Status:

___ single ___ married ___ widowed ___ divorced ___ separated ___ common law

Did your marital status change this year YES ___ if so what date?

Date:

Did you hold foreign property over \$100,000 at any time during the tax year?
(including real estate) Yes ___ No ___ (if yes provide full details)

Are you a citizen of Canada ___ yes ___ no | are you a US visa holder
Are you a citizen of: Visa type _____

United States citizen or green card holder yes ___ no ___

If yes - SSN / ITIN _____ - _____ - _____

Deductions: (Check all that apply for the tax year)

___ **Did** you contribute to an RRSP
how much: \$ _____ (all slips must be attached)

___ **Did** you buy back pension time (attach slip or details)

___ **Did** you pay Union or Professional Dues (if yes, attach
information, how much and to whom) or ___ shown on your T4

___ **Did** you pay child or spousal support (how much \$ _____
and to whom _____, SIN# _____
Full legal name _____)

___ **Child** care expenses (how much \$ _____ and to
whom _____ SIN# _____)
If a camp provide receipt & number of weeks

___ **Do** you have investments made using a Personal Line of
Credit (if yes, you must attach the year end statement)

___ **Did** you pay investment consulting fees or custodial fees

___ **Did** you work from home (claiming home office expenses
___ simplified # of days worked at home ___ -OR-
___ detailed go to 7thwavefinancial.com & complete the --
Home office expense form

Income Sources

Do you feel you have all your slips ___ Yes ___ No ___
(if not, please provide us details on what you think you are missing)

Employment-

___ **Employment** Income (are all T4 slips attached? ___ yes ___ no)

___ **Commissions**, Tips, other remuneration (attach full information)

___ **Disability** Benefits or EI

___ **Do** you get the Disability Tax Credit? ___ First year?

___ **Did** you receive support payments (spouse or child support)

Retirement Income-

___ **Pension** income from a corporate pension plan

___ **Payments** from Canada Pension Plan (CPP)

___ **Payments** from Old Age Security (OAS)

___ **Payments** from a RRIF plan

Investment Income-

___ **Did** you sell any stock(s)? (attach full information)

___ **Are** All T5 and T3 Slips for interest and dividend income
attached? (if you believe slips are missing, please note what slips
in the special notes below)

Notes:

___ Self employment income -OR- ___ Rental property income

**if yes you must go to the tax section on our website and fill out the
appropriate schedule. Go to 7thWaveTaxSolutions.com (please
complete our Small busines or rental property form *mandatory!**

Credits:

___ **Did** you pay rent or property tax in (if so how much \$ _____
and to whom _____)

___ **Did** you pay medical expenses and/or premiums for Extended
Health Care or Long term care Insurance (if so, how much
\$ _____ and to whom _____) (attach
list if needed or provide receipts)

___ **Do** you have a Home Buyers Plan? (attach assessment)

___ **Do** you have a Lifelong Learning Plan? (attach assessment)

___ **Did** you pay any tuition for yourself or for a child or dependent?
(if yes, provide details, you must attach a signed copy of your child's
T2202A)

___ **Did** you pay quarterly installments to CRA (if so,
please provide year end statement) **total installments for year**
\$ _____

___ **Did** you sell your principal residence, a vacation home or a
rental home or residence during the tax year? (if so provide full
details on the sale as well as purchase price and date)

___ **Did** you change use of a property from a principal residence to a
rental -OR- from a rental to a principal residence

Please list all dependents:

Name	Date of Birth	SIN#	Income for year
_____	_____	_____	_____
_____	_____	_____	_____