

Name: _____ Daytime Phone: _____
 Address: _____ Cell: _____
 D.O.B.: _____ Email: _____

2021

Delivery Instructions: E-mail Portal Mail Pickup (For extra printing fee) Pickup: Edmonton Elk Point Fort Saskatchewan
 * For e-mail copy, your password is the 3 middle digits of your SIN.

Keep this tax package for 7 years.

OFFICE USE ONLY

Date in: _____
 Fee Quoted: _____
 Retainer Pd? _____
 PTR IN CHG: TG/PS/JH
 Referral: _____
 Billed w/company

2021 PERSONAL INCOME TAX ENVELOPE

GIVENS^{LLP}



- 1) **General** – provide:
 - a) Did marital status change? Date, if changed: _____ Y [] N []
 - b) Has there been a change in address in the past year? Y [] N []
- 2) For new **Dependents** please provide names, birth dates, SIN numbers & Gender: _____
- 3) Is this a Final return due to death? Y [] N []
 Date of death: _____
- 4) **Have you sold your principle residence this year?** Y [] N []
 If yes please provide: a) Date of purchase _____ c) Cost of purchase _____
 b) Date of sale _____ d) Proceeds _____
- 5) Do you qualify for **disability tax credit**? Y [] N []
- 6) **Include all slips** (T4, T5, T3, T4A, etc.)
- 7) **Receipts** for:

a) Medical expenses	[]	g) RRSPs	[]
b) Donations	[]	h) First time home buyer	[]
c) Child care expenses	[]	i) Volunteer firefighter	[]
d) Support payments (made received)	[]	j) Union dues	[]
e) Political contributions	[]	k) Interest on student loans	[]
f) Tuition/T2202A - if transferring from dependant	[]		
- 8) **Income/Expenses** from:
 - a) Business, Commissions, Farming and/or Rental.
 - b) Is Givens completing the GST return for your farm or business activities? Y [] N []
 - i) Reporting Frequency Monthly [] Quarterly [] Annually []
 - ii) GST Forms enclosed Y [] N []
- 9) Details of other **income and expenses** that may be applicable:
 - a) Employment expenses (T2200 required) [] b) Office in home expenses []
 - c) Any acquisitions and/or disposition of assets [] d) Moving expenses [] e) Teacher supplies credit []
- 10) **Foreign property (real estate and/or investments)** with a total cost of more than \$100,000 Canadian. Y [] N []
- 11) **Do you invest with a broker or have stocks purchased through an employer?** Y [] N []
 If yes; Review Broker Consent form.
- 12) **Do you have any investments in cryptocurrency worth more than \$100,000?** Y [] N []

Please note that Canada Revenue Agency assesses significant penalties for missed information slips. Please ensure that you have slips for all income and that any slips received late are brought to our attention immediately.

Notes: _____

ALL information gathered will be maintained in accordance with our privacy policy.
 This checklist is a reminder to include everything for your personal income tax return.

PLEASE PLACE ALL ITEMS IN ENVELOPE AND FORWARD TO OUR OFFICE.

DISCLAIMER: AREAS LEFT BLANK WILL BE ASSUMED NOT TO HAVE CHANGED FROM PRIOR YEAR.

PLEASE NOTE:

- We cannot guarantee your return will be completed if not received in our office by April 23, 2022.