



Certified General Accountant

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It's Tax Time Again!

The Certified General Accountants Association of Alberta recommends this checklist be completed every year **prior** to commencing the preparation of your tax return. **Please** complete and return to our office with your tax information. If you own a business, have rental properties, claim employment expenses or have moved during the year. Please complete the appropriate checklist, which can be downloaded from our website at www.misura.ca. Call if you have any questions, we are here to help

Personal information the same as prior year (If yes, go to the questions marked with an asterisk)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Mr Mrs Miss Ms Taxation year: _____

First Name _____ Email _____

Last Name: _____ Date of Birth _____

Address: _____ Home Phone: _____

City: _____ Work Phone: _____

Postal Code _____ S.I.N. _____

Province of residence in December 31 _____

Do you have Canadian citizenship? No Yes

Do you have foreign citizenship? No Yes → If yes, what country? _____

Became of ceased to be a resident of Canada during the year? No Yes → If yes, what date? _____

Marital status on December 31 Married Widowed Common-law
 Single Separated Divorced

If Married or Common-law, please complete:

Spouse's Name Mr. Mrs. Miss Ms. _____

Spouse's Date of Birth (M/D/Y) _____ Spouse's S.I.N. _____

Spouse's net income for taxation year \$ _____

Did your marital status change during year? No Yes → Date of change _____

Personal Tax Information Request Form - 2009

Dependant Information: *(Please include S.I.N. where available)*

First Name	Last Name	Date of Birth M/D/Y	Relationship	S.I.N.	Net Income

Do you pay or receive any taxable child maintenance payments? \$ _____ Per month Receive or pay? (please circle one)

If you pay: Recipients name: _____ S.I.N. # _____

Pay any child care expenses? _____ Recipient's name: _____

Address: _____ S.I.N.#: _____

Anyone permanently disabled? _____ Has T2201 (Disability Tax Credit Certificate) been filed? _____

Additional Information:

* Do you own any assets outside of Canada at anytime during the year with a cost in excess of \$100,000 (Canada) Yes No

* Did you pay **personal tax installments** to CRA this year? Yes No Amount\$ _____

* Authorization for elections Canada? Yes No

* Do you want your return e-filed? No Yes → signed T183E is attached

*Do you give Misura P.C. permission to email you a PDF copy of your entire personal tax return (as this will not be printed out)? No Yes Email address: _____

Would you like a tax preparer to contact you?

No

Yes ↓

Please note: The following will apply should you request an appointment with someone regarding your tax return. Certified General Accountant \$250.00 per hour, Accounting Technician \$50.00-130.00 per hour.

Question/concern:

Email/phone/fax/other:

*** I have disclosed all sources of income earned this year for preparation of this tax return.**

Signature:

Date:

*** All questions marked with an asterisk MUST be completed.**

Misura Professional Corporation is not responsible for missing or inaccurate information.