



WPF INCOME TAX RETURN PREPARATION FORM

Are you interested in tax planning? **Y / N**
 Ask us today how you can benefit!
 Preferred contact for appointment setting:
 Method of contact: **Phone** **Email** **Text** **Other:** _____
 Provide details of preferred method of contact: _____

DATE: _____

HOW DID YOU HEAR ABOUT WPF?						COLLEGE CAMPUS:			
TAX YEARS:									
SIN#:					Student#:				
Non-Resident Return:	Y / N	Service Requested:							

CLIENT INFORMATION		Title: Mr / Ms / Mrs	Foreign Income(\$CAD)			Date of Arrival	mm	/dd	/yy
Last Name:					First Name:				MI:
Address:					City & Prov.:				Postal Code:
Personal Email Address:					DOB:	mm	dd	yy	
Telephone #:					Disposed of your principal residence? Y / N		You or your spouse moved more than 40kms for school or work? Y / N		

Marital Status:	Single	Married / CL	Separated	Divorced	Widowed	Spousal return?	Y / N	CDN Citizen?	Y / N	
Date of marriage, if during tax year:	mm	dd	yy	Name Change:		Y / N	Date of Departure	mm	/	/yy
Provide email address to CRA? Y / N		Date of Departure	mm	/c	/yy	First Return?		Y / N		
Tuition transfer? Y / N		Did you attend college or university?		Y / N	OSAP Loan Repayment Y / N		If yes, Loan interest ? \$			
Disability Tax Credit Y / N		Disability transfer? Y / N			Medical Expenses: \$		New / Prior Year Client			
Info provided to Election's Canada? Y / N		Did you own any Foreign Property over \$100,000 CDN?				Y / N				

Other Relevant Info:		First Return?		Y / N	Status in Canada:	
RRSP Contributions Y / N	\$	HBP/LLP Repayment Amount \$		RRSP Withdrawal? Y / N		
Are you a First Time Home Buyer/LLP? Y / N		RRSP Contribution Limit from last Notice of Assessment for the last tax year filed: \$				
Political/Charitable Contributions? Y / N		If yes, have you made any donations if the past 5 yrs? Y / N				
Did you provide Volunteer Emergency Services? Y / N		Did you provide Volunteer Search & Rescue Services? Y / N				
Did you dispose of your principal residence for which you would like to claim the total or partial exemption? Y / N						
Do you have any Capital Gains/Losses? Y / N		Apply for Pension Income Splitting? Y / N		TFSA? Y / N		

Direct Deposit Y / N	Banking Info: Transit#:		XXXXX	Account#:	XXXXXXXXXX	Branch #:	XXX
<i>The Government of Canada will be phasing out paper cheques on April 1, 2016. This application must be made to avoid interruption of benefits. (\$5 Fee)</i>							
Slips	<i>(Indicate the number slips)</i>						Self-Employment Y / N
T4 _____	T4(AP) _____	T4RSP _____	T3 _____			Rental Incom Y / N	<i>(If these apply please ask for related form)</i>
T4E _____	T4(OAS) _____	T5007 _____	T5 _____				
T4A _____	T4PS _____	T2202A _____	Other _____				

Spousal Information		Title: Mr / Ms / Mrs	Foreign Income(\$CAD)			SIN:		
Line 236 \$					Date of Arrival	mm	/dd	/yy
Last Name:					First Name:			MI:
Address:					City & Prov.:			Postal Code
Personal Email Address:					DOB:	mm	dd	yy
Other Relevant Info:					Telephone #:			
Provide email address to CRA? Y / N		Date of Departure	mm	/c	/yy	First Return?		Y / N
Disability Tax Credit Y / N		Disability transfer? Y / N			Medical Expenses: \$		New / Prior Year Client	

Info provided to Election's Canada?		Y / N		Did you own any Foreign Property over \$100,000 CDN?			Y / N		
CDN Citizen?	Y / N	Name Change:	Y / N	First Return?	Y / N	Status in Canada:			
Did you attend college or university?		Y / N	OSAP Loan Repayment	Y / N	If yes, Loan interest?	\$	Tuition transfer?	Y / N	
RRSP Contributions		Y / N	\$	HBP/LLP Repayment Amount		\$	RRSP Withdrawal?	Y / N	
Are you a First Time Home Buyer/LLP?			Y / N	RRSP Contribution Limit from last Notice of Assessment for the last tax year filed: \$					
Political/Charitable Contributions?		Y / N	If yes, have you made any donations if the past 5 yrs?		Y / N				
Did you provide Volunteer Emergency Services?			Y / N	Did you provide Volunteer Search & Rescue Services?			Y / N		
Do you have any Capital Gains/Losses?		Y / N	Apply for Pension Income Splitting?	Y / N	TFSA?		Y / N		
Direct Deposit	Y / N	Banking Info: Transit#:			XXXXX	Account#:	XXXXXXXXXX	Branch #:	XXX
The Government of Canada will be phasing out paper cheques on April 1, 2016. This application must be made to avoid interruption of benefits. (\$5 Fee)									
Slips	(Indicate the number slips)						Self-Employment		
T4	T4(AP)	T4RSP	T3			Y / N			
T4E	T4(OAS)	T5007	T5			Rental Incom			
T4A	T4PS	T2202A	Other			Y / N (If these apply please ask for related form)			

(For more dependants please ask for Additional Dependant Form)

Dependant #1 Info.	Date of Arrival	mm /dd /yy	Dep. return?	Y / N	SIN:				
Relation: Daughter Son Stepdaughter Stepson Mom/ Dad Niece / Nephew Other:									
Last Name: _____			First Name: _____						
DOB: mm dd yy		Medical Expenses: \$		Date of Departure	mm /c /yy				
Personal Email Address: _____			Telephone #: _____						
Other Relevant Info:	Moved more than 40kms for school or work?			Y / N	Line 236	\$			
Provide email address to CRA? Y / N	Date of Departure	mm /c /yy	First Return?		Y / N				
Disability Tax Credit	Y / N	Disability transfer? Y / N	Medical Expenses: \$		New / Prior Year Client				
Info provided to Election's Canada?		Y / N		Did you own any Foreign Property over \$100,000 CDN?			Y / N		
CDN Citizen?	Y / N	Name Change:	Y / N	First Return?	Y / N	Status in Canada:			
Did you attend college or university?		Y / N	OSAP Loan Repayment	Y / N	If yes, Loan interest?	\$	Tuition transfer? Y / N		
Direct Deposit	Y / N	Banking Info: Transit#:			XXXXX	Account#:	XXXXXXXXXX	Branch #:	XXX
The Government of Canada will be phasing out paper cheques on April 1, 2016. This application must be made to avoid interruption of benefits. (\$5 Fee)									
Slips	(Indicate the number slips)						Self-Employment		
T4	T4(AP)	T4RSP	T3			Y / N			
T4E	T4(OAS)	T5007	T5			Rental Incom			
T4A	T4PS	T2202A	Other			Y / N (If these apply please ask for related form)			

Benefits & Credits	Apply for the Ontario Trillium Benefit?	Y / N	(Including the Ontario Sales Tax Credit)	OSHPTG?	Y / N
Did you pay rent/property tax, if so select.		Y / N	Landlords Name: _____		
1. Rental address/city: _____		Total Rent/Tax Paid: \$		Postal Code: _____	
GST Credit will be automatically issued by CRA if you qualify for 2017.		Total Rent/Tax Paid: \$		# of mths: _____	
2. Rental address/city: _____		Landlords Name: _____		Postal Code: _____	
Total Rent/Tax Paid: \$		Total Rent/Tax Paid: \$		# of mths: _____	
3. Rental address/city: _____		Landlords Name: _____		Postal Code: _____	
Total Rent/Tax Paid: \$		Total Rent/Tax Paid: \$		# of mths: _____	

Additional Information:					

I, _____ hereby declare that all information provided to prepare my Income Tax Return(s) to be true and that I am eligible for all applied credits. I agree to submission either electronically or paper filed depending on my situation. Information and receipts requested by the CRA will be provided by the Taxpayer upon request.

Taxpayer Signature: _____

Date: _____