

2013 YOU FIRST Financial Tax Service

For New Tax Clients

In an effort to save you money and time, we have prepared simple checklists for you. Please bring in this completed checklist along with your tax documents. (Do not email your bookkeeping documents nor send us your CDs please.)

Please note that we have a **two-week turnaround**. We do guarantee that your return will be completed by the April 30 deadline **provided that we have all documentation and required information at least 2 weeks before the deadline.**

Name: _____ Spouse Name: _____
DOB (dd/mm/yyyy): _____ Spouse DOB (dd/mm/yyyy): _____
SIN: _____ Spouse SIN: _____
Address (to use on tax return): _____
Single__ Married__ Divorced__ Common-Law__ (Give Date if status changed in 2012 (dd/mm/yyyy): _____)
**Is this your first Canadian Tax Return? _____
**If yes what exact date did you arrive in Canada? _____
Are you a Canadian citizen? _____
Do you own foreign property or investments with a total cost or more than \$100,000 Canadian? _____
Dependents: Child's name: _____ DOB (dd/mm/yyyy): _____ F ___ M ___ SIN: _____
Child's name: _____ DOB (dd/mm/yyyy): _____ F ___ M ___ SIN: _____

____ **Notice of Assessment (last tax year)**
____ T4 (employment income)
____ T4A (other income)
____ T3 (investment income – Please make sure you have them all)
____ T5 (investment income – Please make sure you have them all)
____ T4RSP, T4RIF (RRSP/RRIF Income)
____ T4OAS, T4AP (retirement income)
____ Union or professional dues receipts
____ T2200 (if employment expenses) *
____ Support payment paid _____ Taxable or not? _____
____ Support payment received _____ Taxable or not? _____
____ Tips \$ _____
____ Commissions not reported on T-Slip \$ _____
____ Child care expenses:
(Daycare name or Name & SIN of babysitter, # of weeks)
____ Child Tax Benefit Receipts
____ RRSP contributions receipts
____ December 31st Investment statements: *
(Showing capital gains or losses, Adjusted Cost Base, etc.)
____ Tuition receipts
____ Student loan interest statement
____ Public Transit Pass/Receipt
____ Donation receipts
____ Medical receipts for family: *
(Dental & extended medical premiums also)
____ Moving Expenses *
____ Rental Expenses *
____ Safety Deposit Box \$ _____
____ Tax installments:
(Payment amount made for the year and Date – Attach Statement)
____ Do you have to make a Home Buyer's Plan repayment? _____
____ Please apply the excess RRSP to the Homebuyers plan _____

Were you living in BC on December 31st 2012? _____
If not, where? _____

*** MUST BE SUBMITTED WITH OUR FORMS**
**** PLEASE BRING A COPY OF PREVIOUS YEAR'S RETURN**

Here is our 2013 tax year preparation price list (ALL INVESTING CLIENTS WILL HAVE 20% DISCOUNT):

For Business, Rental, Moving, Medical and Employment expenses you must complete our special checklist worksheet in order to get these low preparation fees.

	Checklist	NO Checklist		
Basic return	\$65	\$75	Quebec Return	\$125 **
Basic - one T4 only	\$55	\$75	USA Return	\$295 ***
Medical Expenses Worksheet	\$50 **	\$75	Other forms	\$35 **
Moving Expense Worksheet	\$75 **	\$100	Foreign Income Worksheet	\$55
Rental Income Worksheet	\$135 **	\$200	Extra time	\$35 / hour
Business Activities Worksheet	\$250 **	\$500	If we print your emailed docs / CDs	\$50
Employment Expenses Worksheet	\$120 **	\$150	Reprints (if docs are submitted late)	\$25
Capital Gains Worksheet	\$90**	\$100	GST Return	\$45

**** We may charge more depending on complexity and if you did not complete our forms.** We can give you a firm estimate when all documents have been received. ***** Additional charges for additional U.S. forms required.**

We expect you to pay when you pick up your return. Cheques are preferred but cash is accepted. Sorry no credit or Debit cards accepted.

When your return is completed, we will contact you to pick up. Complete the following:

- I will pick up my return ___ Call me at _____ or e-mail me at _____
- I want my returned mailed to my home address (\$3.00 or more depending on weight) _____
- I want my return Express Post to my home address (\$8 or more if outside of BC) _____

WHY ARE OUR TAX PREP SERVICES SO INEXPENSIVE compared to other tax preparers?

This is an added service to our investment clients. Help us to keep this service inexpensive by completing all checklists that relate to your tax return. Thank you!

YOU FIRST Financial & Benefits Consultants Ltd.
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