

Name of Client	C#	Date
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### CLIENT INTERVIEW CHECKLIST – T1 2019

Name, Address, Tel, DOB, Year of Filing	Y	N	Date
Spouses Name, DOB, SIN#, Income & Marriage Date			
Children's Names & DOB			
Info to Elections Canada			
Principle Residence – Sale or Purchase of			
Foreign Property \$100,000 +			
Bankruptcy			
Direct Deposit? Yes – Info still correct? No – Bank info			
Copy of previous year's NOA			
Made any Installments?			
T4 – Box 32? Yes – Complete Travel Expense Form			
T3			
T5			
T5008 – Investment Statements			
RRSP – Contribution +T4RSP			
Northern Resident – How long? Date if less than 6 months, Anyone else claiming in household?			
Northern Resident – Box 32?			
Truck Driver Expenses – TL2 (Log Book?)			
Medical Receipts – If Travel – Date & Receipts			
Child care expenses T-777			
Donations			
T2202A			
Professional Dues			
Business Income & Expenses T2125			
Rental Properties T776			
Farm Income & Expenses T2042			
TFSA			
Employment Expenses T2200			

