

Phone: (604) 904-3807  
Fax: (604) 904-3806



Email: Accountants@LNCo.ca  
Website: www.LNCo.ca

## 2016 PERSONAL TAX CHECKLIST

Personal information				
First name		Last name		
Street address		City	Prov	
Postal code	Birthdate		SIN #	
Home phone:	Cell:	Work phone:		
Email 1:		Email 2:		
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Common Law <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed				
<b>Family changes/dates (birth, marital status, death) –</b>				
Canadian citizen <input type="checkbox"/> Y <input type="checkbox"/> N		American citizen <input type="checkbox"/> Y <input type="checkbox"/> N		
<b>Completing return for spouse/partner?</b> <input type="checkbox"/> Y <input type="checkbox"/> N		If no, please provide <b>Net Income:</b> \$ <u>AMOUNT</u>		
Spouse/partner first name		Last name		
Birthdate:		SIN #		
<b>Dependents (children or senior parent living with you)</b>				
Name	Address (if different)	Relationship	Birthdate	SIN #
Do you want to provide your address and information to Elections Canada? <input type="checkbox"/> Y <input type="checkbox"/> N				
Do you own investments or property outside of Canada which cost more than \$100,000 CDN? <input type="checkbox"/> Y <input type="checkbox"/> N				
Were you a first time homebuyer in 2016? <input type="checkbox"/> Y <input type="checkbox"/> N				
***NEW - Did you sell a principal residence in 2016?*** <input type="checkbox"/> Y <input type="checkbox"/> N				
<b>For self-employed individuals / sole proprietors</b>				
Would you like us to summarize your expenses?		<input type="checkbox"/> Yes, please summarize (note extra cost at \$75/hour)		
		<input type="checkbox"/> No, I've already summarized		
Are you registered for HST/GST? <input type="checkbox"/> Y <input type="checkbox"/> N		Filing period: <input type="checkbox"/> Regular <input type="checkbox"/> Quick		
Would you like us to complete your HST/GST return?		<input type="checkbox"/> Yes (please include required documents)		
		<input type="checkbox"/> No (please provide copy of HST/GST filed)		
<b>Secure delivery of my completed taxes</b>				
In our continued efforts to be a “green” company by becoming a paperless office, we will be providing a digital copy of your completed Personal Tax Return through our secure delivery portal. <i>*A paper copy can be provided upon request.</i>				
I will pick up my source documents/records from: <input type="checkbox"/> North Vancouver or <input type="checkbox"/> New Westminster				
I would like you to return my documents by: <input type="checkbox"/> Courier or <input type="checkbox"/> Registered Mail				
*There will be a \$10 surcharge for returning your documents by courier/mail.				
IF THIS IS YOUR FIRST YEAR FILING WITH US, PLEASE PROVIDE A COPY OF YOUR PREVIOUS YEAR'S TAX RETURN				