**CLARK & COMPANY**

Chartered Professional Accountants

209 – 12877 76 Avenue, Surrey, BC, V3W 1E6

Ph: (778)593-7565 Fax: (778)593-7833

admin@clarkco.ca

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_ Cell: \_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell:\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth Spouse: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Children and/or dependants:**

Name M/F Date of Birth Income

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Change of marital status: € Married € Common-law € Separated € Divorced € Widow/er

Date of Change:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name of Partner:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Last year’s notice(s) of assessment € Instalment payments

**Income** **Deductions** **Credits**

⁭T4 ⁭ Employment ⁭ Employment expenses\* Charitable donations

⁭T4A ⁭ Pension, OAS, CPP, other ⁭ RRSP contributions ⁭ Medical expenses\*

⁭T3,T5 ⁭ Investment income ⁭ Union/professional dues ⁭ Care expenses

⁭T4’s ⁭ E.I. ⁭ Child care expenses\* ⁭ T2202 - Tuition

⁭ WCB income ⁭ Carrying charges ⁭ Equivalent to spouse\*

⁭ Capital gains/losses ⁭ Interest expense ⁭ Student loan interest

⁭ Spousal support ⁭ Moving expenses\* ⁭ HBP withdrawals

⁭ RRSP withdrawal ⁯ Spousal support\* Disability\*

⁯ Rental income ⁮ Tax Shelters ⁭ Infirm/caregiver

⁯ Business income ⁭ Political contributions

⁯ Misc. income ⁭ Child Fitness/Art

⁯ Foreign income ⁭ First time homebuyer RC62 Universal childcare Apprentice\*

benefits Transit expenses\* Seniors home

renovations\*

Value of foreign assets? \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you need rental income and expense worksheets?

Do you need business income and expense worksheets?

Download forms at [clarkco.ca](mailto:admin@clarkco.ca) or call us. \* Additional information on clarkco.ca