



AH Accounting Service

T1 Personal Income Tax Return — Client Intake Form & Document Checklist

SECTION 1 — PERSONAL INFORMATION

First Name

Last Name

Date of Birth (YYYY-MM-DD)

Social Insurance Number (SIN)

Marital Status on Dec 31:

Single

Married

Common-Law

Separated

Divorced

Widowed

Province / Territory of Residence on Dec 31

Tax Year Being Filed

Home Address (Street, City, Province, Postal Code)

Phone Number

Email Address

Previously filed with AH Accounting:

Yes

No

First year filing in Canada:

Yes

No

CRA My Account registered:

Yes

No

SECTION 2 — SPOUSE / COMMON-LAW PARTNER (if applicable)

■ Complete this section only if you were married or in a common-law relationship on December 31 of the tax year.

Spouse / Partner Full Name

Date of Birth (YYYY-MM-DD)

Spouse / Partner SIN

Spouse / Partner Net Income for the Year (\$)

☐ Spouse / partner's return is also being prepared by AH Accounting Service this year

SECTION 3 — DEPENDANTS (Children / Other)

■ List all dependants you are claiming, including children under 18, eligible dependants, or infirm dependants.

Full Name	Date of Birth	Relationship	SIN (if 18+)	Net Income \$

SECTION 4 — INCOME DOCUMENT CHECKLIST

■ Check each item you are providing. Leave blank if the item does not apply to you.

Employment Income

- ☐ T4 slip(s) — Employment Income
One T4 per employer
- ☐ T4 slips from all employers (if you had more than one job)
- ☐ Employment Insurance (EI) — T4E slip

Self-Employment / Business Income

- ☐ Summary of self-employment income and expenses
- ☐ Business bank statements (if self-employed)
- ☐ GST/HST returns filed (if registered)
- ☐ Home office expense details (sq. ft. of workspace vs. total home)
Required if claiming home office deduction
- ☐ Vehicle logbook and total km driven for business vs. personal
Required if claiming vehicle expenses

Investment Income

- ☐ T3 slip(s) — Trust / Mutual Fund income
- ☐ T5 slip(s) — Investment income (dividends, interest)
- ☐ T5008 slip(s) — Securities transactions / capital gains
- ☐ Summary of capital gains/losses (if not on slips)

Rental Income

- ☐ Summary of rental income received
- ☐ Summary of rental expenses (mortgage interest, property tax, maintenance, insurance, utilities)
- ☐ Statement of mortgage interest paid (from lender)

Pension & Retirement Income

- ☐ T4A slip(s) — Pension, annuities, other income
- ☐ T4A(P) slip — Canada Pension Plan (CPP) benefits
- ☐ T4A(OAS) slip — Old Age Security (OAS) benefits
- ☐ T4RIF slip — Registered Retirement Income Fund (RRIF) withdrawals

Other Income

- ☐ T4PS slip — Profit sharing plan income
- ☐ T5013 slip — Partnership income
- ☐ Foreign income documentation (converted to CAD)
Include foreign tax paid for foreign tax credit
- ☐ Workers' Compensation (WCB) or social assistance — amount received
- ☐ Alimony / support received (court order or written agreement)

SECTION 5 — DEDUCTIONS & CREDITS CHECKLIST

RRSP

- ☐ RRSP contribution receipts (March 1 of prior year to Dec 31 of tax year)
- ☐ Spousal RRSP contribution receipts (if applicable)
- ☐ RRSP deduction limit from prior year NOA (if available)

Childcare & Family

- ☐ Childcare receipts (daycare, babysitter, after-school programs)
Must include provider name, address, SIN/BN, and amounts
- ☐ Adoption expenses receipts (if applicable)
- ☐ Eligible dependent or caregiver information

Medical Expenses

- ☐ Receipts for medical, dental, vision, and prescriptions (all family members)
- ☐ Receipts for medical devices, equipment, or travel for medical purposes
- ☐ Disability Tax Credit (DTC) certificate — T2201 (if applicable)

Charitable Donations

- ☐ Official donation receipts from registered Canadian charities
- ☐ Political contribution receipts (federal or provincial)

Education & Training

- ☐ T2202 — Tuition & Enrolment Certificate
- ☐ Student loan interest paid (official statement from lender)
- ☐ Canada Training Credit limit (from prior year NOA)

Home-Related

- ☐ First Home Savings Account (FHSA) — T4FHSA slip
- ☐ Home Buyers' Plan (HBP) repayment amount (if applicable)
- ☐ Lifelong Learning Plan (LLP) repayment amount (if applicable)
- ☐ Property tax / rent paid (for provincial credits — amount and landlord info)

Other Deductions & Credits

- ☐ Union or professional dues receipts
- ☐ Moving expense receipts (if moved for work or school)
Must have moved 40+ km closer to new work/school location
- ☐ Northern residents deduction information (if living in prescribed zone)
- ☐ Carrying charges / investment fees (statements from advisor)
- ☐ Alimony / support paid (court order or written agreement + receipts)

SECTION 6 — YEAR-END QUESTIONS

Life & Financial Changes

Did you move to a new address during the year: Yes No

Did your marital status change during the year: Yes No

Did you have a new child born or adopted: Yes No

Did you immigrate to or emigrate from Canada during the year: Yes No

☐ Did you have any foreign assets with a total cost over \$100,000 CAD?

T1135 Foreign Income Verification may be required

Did you receive any government benefit payments (e.g. CERB, CRB): Yes No

☐ Did you sell your principal residence?

Principal Residence Exemption reporting required

Did you sell any other real estate or investments: Yes No

Tax Instalment Payments

☐ I made personal tax instalment payments to CRA during the year

Total instalment payments made: \$

Direct Deposit

☐ I would like to set up / confirm CRA direct deposit for refunds and benefits

Bank Transit Number (5 digits)

Institution Number (3 digits)

Account Number

Additional Information

Is there anything else we should know?

SECTION 7 — AUTHORIZATION & SIGNATURE

■ By signing below, you confirm that all information provided is accurate and complete to the best of your knowledge, and authorize AH Accounting Service to prepare and file your T1 Personal Income Tax Return with the Canada Revenue Agency.

Full Legal Name (Print)

Date (YYYY-MM-DD)

Signature

AH Accounting Service

Please return this completed form along with all applicable documents. Contact us at your earliest convenience.

For Internal Use Only

Received By	Date Received	File Reference #