

Phone _____ or _____

Start date: _____ Date completed: _____

☐ Return mailed ☐ Efiled ☐ COD ☐ Pending

Awaiting client information

Notes:

☐ Client information missing> _____

☐ Missing signatures> _____

☐ _____

☐ _____

☐ _____

☐ _____

Other: _____

WAITING FOR PAYMENT

Fees due to H&R Block..... \$ _____

☐ Refund ☐ Balance due ☐ Needs Signatures

Client contact history

Date	Time	Results

☐ ORIGINAL SLIPS RETURNED TO CLIENT

Date: _____

Client signature

Associate Signature

Tax Interview GUIDE

Fee range type

☐ SIN Date of Birth _____

Province of Residence on December 31 _____

☐ Change of address _____

If the SIN starts with a 9 or 0 or taxpayer arrived in Canada during the tax year - residency status must be determined (Complete the Guide for Determining Residency Status of Taxpayers Entering Canada.)

Are you a Canadian citizen? ☐ Yes ☐ No

If yes - provide information to Elections Canada? ☐ Yes ☐ No

☐ Disability or Infirmary ☐ Disability on file with CRA

Type of infirmity: _____

☐ Are you a U.S. citizen or green card holder? If yes, U.S. return is required

☐ Immigrated or emigrated in the tax year?

If yes, date of entry or exit _____

☐ Holding foreign property in the tax year with a total cost over \$100,000CAD ☐ Yes ☐ No

(T1135 must be efiled separately from return)

Personal Information

Marital status on December 31: ☐ Single ☐ Married ☐ Common law ☐ Separated ☐ Divorced ☐ Widowed

If married or common law, spousal information is required **even** if not filing with us:

Name _____ ☐ SIN ☐ Spouse living in Canada

Date of Birth _____ Net Income \$ _____

☐ Change of marital status in tax year? Date of change _____

If separated or divorced for the entire year:

☐ Receiving or paying support?

Child support \$ _____ Spousal support \$ _____

☐ Any change in custody in the year? Spousal information is required if receiving or paying support:

Name _____ ☐ SIN _____

☐ First time filing a Canadian tax return? ☐ Yes ☐ No

☐ Surname change since last year? If yes, name on last return? _____

Marital Status

☐ Dependent children or other dependants

☐ Child under 18 ☐ Child turning 19 before April of the following calendar year?

☐ If single parent, designate to child? If yes, file return for dependant. Explain GST credit. _____

Child under 16 (or 16 and over if disabled): ☐ Child care expenses (_____ daytime or _____ overnight?)

☐ Dependant disabled or infirm?

☐ Disability on file with CRA? Type of infirmity: _____

Dependants

☐ T4 Income from employment: Tips \$ _____ Casual labour \$ _____

GST rebate \$ _____

Income reported on other T-slips:

☐ T3 or T5 ☐ T4 RRSP ☐ T4 RRIF ☐ T4A

☐ T5007 ☐ T4A (OAS) ☐ T4A (P) ☐ T4E

☐ T5008 ☐ T5013 ☐ T4A - other income

☐ Eligible retiring allowance

☐ RRSP or RRIF receipt for transfer

☐ T4 - boxes 78 to 83 require business statement

☐ T4A - boxes 20 and 48 require business statement

☐ Investment income (not on a slip)

☐ Disposition of capital property (not on a slip)

☐ Business/professional income ☐ Income from farming or fishing ☐ Rental income

☐ Foreign income ☐ Foreign Pension

Other Income

☐ RRSP contributions: Deduction limit from CRA: \$ _____.

- ☐
- Management fees
-
- ☐
- Accounting fees
-
- ☐
- Investment loan interest
-
- ☐
- Carrying charges pertaining to investment income qualifying for deduction
-
- ☐
- Legal fees for support payments
-
- ☐
- Other

☐ Public transit passes purchased before July 2017

- ☐
- Professional Fees or Union Dues on a receipt
-
- ☐
- GST/HST recorded on professional fees receipt

☐ Eligible educator school supply tax credit

- ☐
- Moving expenses in the tax year
-
- ☐
- Any unclaimed amounts from previous year qualifying for deduction

- ☐
- Home bought in tax year qualifying for first-time
- home buyers' amount**
-
- ☐
- Home owned – Jointly

- ☐
- Home sold in the year that qualifies as
- principal residence**
-
- ☐
- Home owned – Jointly

- ☐
- Taxpayer or any family member have qualifying tuition fees
-
- ☐
- Scholarship income
-
- ☐
- Student loan interest
-
- ☐
- Any unclaimed amounts from previous 5 yrs
-
- ☐
- Tuition transfer within province
-
- ☐
- Inter-Provincial tuition

- ☐
- Family medical expenses
- ☐
- Any unclaimed amounts from the previous year
-
- ☐
- Long-term care
- ☐
- Attendant care
- ☐
- Out of region medical travel

☐ Home accessibility expenses

☐ RPP contributions not reported on slip

- ☐
- Employment expenses (T2200 or TL2)
-
- ☐
- Tradesperson incurring tool expenses
-
- ☐
- Expenses qualifying for GST/HST rebate

- ☐
- Legal fees incurred to collect salary or wages
-
- ☐
- Legal fees paid re: retiring allowances, income tax or EI appeals, etc.

☐ Net capital loss carry forward (from CRA)

☐ Non capital loss carry forward (from CRA)

☐ Northern residence deduction? ☐ Basic ☐ Additional ☐ Travel expenses

☐ Charitable donations? ☐ Any unclaimed amounts from previous 5 years

☐ Instalments paid for tax year? Amount \$ _____.

☐ Federal political party contributions

☐ Provincial political party contributions

Provincial considerations/notes

☐ Rent _____

☐ Property taxes _____

Basic \$

- ☐
- Only 1 - T4 or only 1 - T4A(OAS) or only 1 - T4A(P)
-
- ☐
- T5007 and/or RC62 - any quantity. Absolutely NO other slips or receipts or income not on slips (
- watch out for benefit repayments which are Complex*
-)

Typical \$

- ☐
- CPP or QPP benefits
-
- ☐
- EI benefits
-
- ☐
- Employment income
-
- ☐
- OAS pension
-
- ☐
- Pension income (non-foreign)
-
- ☐
- Social assistance
-
- ☐
- Transit passes
-
- ☐
- UCCB
-
- ☐
- Union dues
-
- ☐
- Worker's Compensation

Intermediate \$

- ☐
- Charitable donations
-
- ☐
- Medical expenses
-
- ☐
- RRSP contributions/income/transfer
-
- ☐
- Scholarships
-
- ☐
- Student loan interest
-
- ☐
- Tuition & education amounts

Advanced \$

- ☐
- Adoption expenses
-
- ☐
- Carrying charges & interest expenses
-
- ☐
- Federal political contributions
-
- ☐
- HBP/LLP/FTHBA
-
- ☐
- Investment income
-
- ☐
- Support payments

Complex \$

- ☐
- Benefit repayment
-
- ☐
- Caregiver amount/Infirm dependant
-
- ☐
- Child care expenses
-
- ☐
- Clergy residence deduction
-
- ☐
- Disability amount/supports/transfer
-
- ☐
- Employment expenses
-
- ☐
- Moving expenses
-
- ☐
- Non-residents/temporary workers
-
- ☐
- Northern Residence deduction
-
- ☐
- ON, NB & BC Healthy Homes Reno Cr.
-
- ☐
- Pension income splitting
-
- ☐
- RESP accumulated income (T1172)
-
- ☐
- Stock options & share deductions

Premier \$

- ☐
- AMT carryovers
-
- ☐
- Bankruptcy return
-
- ☐
- Business/Professional-Commission Income
-
- ☐
- Capital gains deduction
-
- ☐
- Capital gains
-
- ☐
- Capital losses of other years
-
- ☐
- Exploration & development expenses
-
- ☐
- Farming/Fishing income
-
- ☐
- Foreign income & FTC
-
- ☐
- GST 370
-
- ☐
- Loss carry back
-
- ☐
- Overseas tax credit
-
- ☐
- Partnership income or losses
-
- ☐
- Rental income
-
- ☐
- T3 Trust and Deceased return