



# Gitmaxmak'ay Nisga'a PR/PE Society Personal Income Tax Information 2018 Tax Year

## Client Information

### Personal Information

Full Name: \_\_\_\_\_  
*Last* *First* *M.I.*

Address: \_\_\_\_\_  
*Street Address* *Apartment/Unit #*

\_\_\_\_\_ *City* *Province* *Postal Code*

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

Email \_\_\_\_\_

SIN: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Marital Status: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Spouse's SIN: \_\_\_\_\_ Spouse's Birthdate: \_\_\_\_\_

### Dependents

Dependant's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Dependant SIN: \_\_\_\_\_ Dependant's Birthdate: \_\_\_\_\_

Dependant's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Dependant SIN: \_\_\_\_\_ Dependant's Birthdate: \_\_\_\_\_

Dependant's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Dependant SIN: \_\_\_\_\_ Dependant's Birthdate: \_\_\_\_\_



GITMAXMAK'AY  
NISGA'A SOCIETY

# T1 INCOME TAX RETURN CHECKLIST

## DOCUMENTS PERTINENT TO PREPARING RETURNS

We're would like to help you maximize any refund that you are entitled to. Please use the following checklist to help you gather your documents for your appointment with Charlotte Vannier ([charlotte@gitmaxmakay.ca](mailto:charlotte@gitmaxmakay.ca)).

### Tax Slips

- Employment Income (T4)
- Employment Insurance Benefits (T4E)
- Pension and Annuity Income (T4A)
- CPP and OAS Slips (T4A(P) and T4A(OAS))
- Investment Income (T3, T5, and T5008)
- Tuition (T2202 or TL11)
- Universal Childcare Benefit (RC62)
- Social Assistance and Worker's Compensation (T5007)
- RRSP and RIF Income (T4RSP, T4RIF)

### Receipts

- Charitable and Political Donations
- RRSP Contributions
- Medical Expenses
- Transit Passes
- Child Care Expenses
- Children's Fitness and Arts Expenses
- Student Loan Interest
- Professional or Union Dues (if not on a T4)
- Exam Fees for Professional Designations
- Home Accessibility Expenses (if a senior or eligible for the disability tax credit)

### Other Documents

- Last Year's Notice of Assessment/Reassessment from the CRA
- Copy of Last Years Prepared Taxes (if applicable)
- Other CRA Correspondence
- Taxpayers & Dependant Personal Information (Legal Name, Address, SIN, Birthdate)
- Disability Tax Credit Certificate

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