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Basic Information for Personal Tax

- | | |
|---|---|
| 1. 姓名 | Legal Name |
| 2. 生日 | Date of birth |
| 3. 性别 | Gender |
| 4. SIN 卡号 | Social Insurance Number |
| 5. 电话和 Email | Phone number and email |
| 6. 报税年份居住地 | Residential address |
| 7. 有效收信地址 | Mailing address |
| 8. 婚姻状况 | Marital Status |
| 9. 银行转账信息 | Void cheque/ Direct deposit info |
| 10. 是否为加拿大公民 | Are you a Canadian Citizen? |
| 11. 如果是第一年报税,
请提供具体落地日期 | Date entered Canada if you are first time filing tax. |
| 12. 如果需要申报落地税,
请提供落地当年及前面
2年的加拿大境外收入 (加币金额) | Income outside Canada (Past 3 years) |
| 13. 2020年是否满足由于疫情在家办公?
需要雇主提供的T2200表 | Work from home due to COVID-19?
Please provide T2202 from Employer |

如果报税年份中有任何状态变更, 请告诉我们。

Please let us know if you have any change in the taxation year.

Basic Slips

- 工资收入 T4, 银行利息 T3, 分红 T5, RRSP slips
- 失业保险 T4E 养老金/退休金 T4A-OAS/T4AP
- 学费单 T2202A, 地税单/房租收据 Property tax statement/rental receipts
(如果当年有学费的话, 请务必当年提供)

Additional information

以下如有符合您的情况的, 请与会计师沟通。

Please let us know if the following apply to you.

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|----------------------|---|
| • 委托照顾孩子的支出 | Childcare Expenses |
| • 捐款/医疗支出 | Donation / Medical Expenses |
| • 出租房收入和费用 | Rental Income and Expenses |
| • 股票买卖 T5008 | Stock capital gain |
| • 自雇收入 (是否有 HST) T4A | Self-employment (whether you have HST account or not) |
| • 海外收入 | Foreign Income |
| • 超过 10 万加币的海外资产 | Foreign Asset |