

Tel: (416) 551-5550

Email: : info@cwega.com

http://www.cwega.com

## 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. 是否为加拿大公民                                        | Are you a Canadian Citizen?                           |
| 10. 如果是第一年报税,<br>请提供具体落地日期                         | Date entered Canada if you are first time filing tax. |
| 11. 如果需要申报落地税,<br>请提供落地当年及前面<br>2 年的加拿大境外收入 (加币金额) | Income outside Canada (Past 3 years)                  |

由于信息安全问题,我们将停止报税时帮您设置 Direct deposit。目前各大银行都可通过网页设置 CRA Direct deposit, 如果信息没有修改, 这个设置只需要做一次就可以。请查看第二页浏览 Direct deposit 设置详细说明。如果报税年份中有任何状态变更, 请告诉我们。

Due to the information security concern, we have stopped our direct deposit setup service. You are able to set it up from your online banking website. You only need to set it up once if there is no information change. Please see the second page for more detail about the direct deposit setup. Please let us know if you have any changes 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

更多信息请看第二页 Please see the second page for additional info

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## 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 applies to you.

- |                    |                                                       |
|--------------------|-------------------------------------------------------|
| • 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                                         |
| • 房产用途变化或买卖        | Change in use of property/Sold a property             |

## CRA Direct deposit

大部分银行允许通过网上银行网页完成申请，如果在设置过程中遇到问题，您需要与您的银行负责人联系协助您设置。以下是各大银行关于设置 CRA 直接存款的相关网页链接，供您参考，如果您的银行不在以上列表内，您可以尝试搜索您的银行名字加上 set up CRA direct deposit。

Most banks allow you to use their online banking to set up CRA Direct deposit Set up. If you have any questions when setting up, please contact your bank for help. Here are the web links for some major banks for your reference. If your bank is not on the list, you may try to search your bank name and “set up CRA direct deposit”

TD: <https://www.td.com/ca/en/personal-banking/covid-19/direct-deposit>

CIBC: <https://www.cibc.com/en/personal-banking/ways-to-bank/cra-direct-deposit.html>

RBC: <https://www.rbcroyalbank.com/ways-to-bank/tutorials/send-and-receive-money/set-up-direct-deposit-cra.html>

BMO: <https://www.bmo.com/main/personal/ways-to-bank/cra-direct-deposit/>

HSBC: <https://www.hsbc.ca/customer-service/cra-direct-deposit/>

Scotiabank: <https://www.scotiabank.com/ca/en/personal/bank-your-way/digital-banking-guide/banking-basics/cra-direct-deposits.html>