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<http://www.cwega.com>

Basic Information for Personal Tax

1. Legal Name
2. Date of birth
3. Gender
4. Social Insurance Number
5. Phone number and email
6. Residential address
7. Mailing address
8. Marital Status
9. Are you a Canadian Citizen? If so, would you like to provide info to Election Canada?
10. Date entered Canada if you are the first time filing personal tax. (If applicable)
11. Past 3 years' worldwide Income before entering Canada (If applicable)

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 contact your bank to help you set up the CRA direct deposit.

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

Basic Slips

- Employment income T4, T4A PS (profit share), Interest income T3, Dividend T5, RRSP slips
- Employment insurance T4E, Old age security T4A-OAS/ Pension income T4AP
- Tuition credit T2202A, Property tax statement or Rental receipts for the year

Additional information

Please let us know if the following apply to you. We have some checklist for applicable expenses.

- Childcare Expenses
- Donation
- Medical Expenses
- T5008 slips for Stock capital gain

We have some checklist for the following items, please contact us and request.

- Foreign Income
- Foreign Asset over \$100,000 CAD
- Rental Income and Expenses
- Self-employment (whether you have HST account or not) (you may have a T4A slip)