



# AEGIS FINANCIAL GROUP INC.

*Building Legacies, Beyond Numbers.*

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## PERSONAL TAX INFORMATION CHECKLIST

### PERSONAL INFORMATION

Full Name:  SIN:

Date of Birth:  Email:

Address:

Phone:

Marital Status:  Single  Married  Common-law  Divorced  Widowed

Spouse's Name:  Dependents:

Moved during the year?  Yes  No New client?  Yes  No

### INCOME INFORMATION

T4 – Employee  T5007 – Statement of Benefits

T4A – Contractor / Self-employment / Pension  Business Income (T2125)

T4A (OAS) – Old Age Security  Rental Income (T776) – How many properties?

T4E – Employment Insurance  Investment Income (T5008/T3/T5)

T4PS – RRSP Withdrawal  RRSP Contributions

T2200 – Employment Expenses

### EXPENSES & DEDUCTIONS

Rent Expense  Charitable Donations

Tuition Expense (T2202A)  Child Care Expenses

Medical Expenses  Professional Dues

Property Sale (Principal Residence?)  Yes  No Foreign Property > \$100,000 (T1135)  Yes  No

Other Deductions:

### DECLARATION

I confirm that the above information is accurate and complete to the best of my knowledge.

Signature:  Date:

Please email the completed form and supporting documents to [info@aegisfinancialgroupinc.ca](mailto:info@aegisfinancialgroupinc.ca)