Tax Package

Tax Preparation US and Canadian
Estate and Trust Returns
Small Business/Farms
Tax Planning/Financial Planning
Insurance & Investments

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Lovell & Associates
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Annual Tax Questionnaire

Its Tax Season at Lovell & Associates Ltd (7th Wave Financial)

This personal tax package and questionnaire is to assist you in gathering all the documents and information necessary for the preparation of your tax return.

Please **carefully** complete our revised application, it is very important that **all** the questions are answered on our questionnaire.

Fill in a separate questionnaire for each person filing a return in your family (note that dependents 17 years and older should be filing to get the HST credit and trillium grant).

If you need extra copies of this or other information, please visit the tax section of our website at:

7thwavefinancial.com

If you are a **new** tax preparation client, please ensure you provide us with a copy of last year's return and notice of assessment.

Please ensure you provide us with all your slips and summaries as well as any documentation (receipts documents etc).

***U.S. tax Clients:* Please drop off your W2 forms as soon as they are received in January or February. We will do the US returns early which will allows time for tax planning. If you do not have your Canadian slips, don't worry, we will do your US return and wait until you have your Canadian slips. Remember, your 1040NR is due by NLT 15 April if you are a visa holder.**

Canadian Clients: *Please drop off as soon as you feel you have all of your slips.*

Last Call: Please drop your documents off by no later than April 12th to ensure we have time to prep your return.

US filers: please drop off your documents by no later than 15 March.

If you are planning on emailing us your tax documents, please attach all documents in **one email** we will confirm receipt of your email.

PLEASE NOTE OUR OFFICE OPEN & FULLY FUNCTIONAL BUT IS CLOSED TO THE PUBLIC (EMPLOYEES ONLY)

-ALL RETURNS WILL BE DONE CONTACTLESS-

Drop off to either of our locations in Amherstburg (NEW!) or Tecumseh (see below)

Electronic: You can email your tax documents. You may wish to black out sensitive data like your SIN number. PLEASE ONE email with all documents attached email to ensure

7thwavefinancialsolutions@gmail.com

Handy Tax checklist

Income
- ☐ Employment and EI (T4 T4E)
- ☐ Investments (T3 T5 T5008)
- ☐ OAS and CPP (T4AP and T4OAS)
- ☐ Pensions (T4A)
- ☐ Social Assistance & WSIB (T5007)
- ☐ All other slips

Receipts
- ☐ RRSP contribution slips
- ☐ Child support paid or received
- ☐ Professional or union dues
- ☐ Medical expenses
- ☐ Tool expenses for trades
- ☐ Charitable donations
- ☐ Childcare or Camps
- ☐ Adoption expenses
- ☐ Moving Expenses
- ☐ Employment expenses
- ☐ Tuition (T2202A)
- ☐ Interest on Student Loans
- ☐ Exams for professional certs.

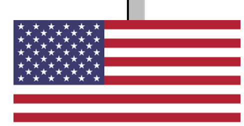
Other Documents
- ☐ Notice of Assessments
- ☐ Last years returns (if a new client)
- ☐ Information on sale of real estate (principal home or other)
- ☐ Sale of stocks or other investments
- ☐ Declaration of condition of employment (T2200)
- ☐ Rental or Business income (see our website for questionnaires)

Return pick up will be curbside

Please drop your documentation off at:

Our office

-492 Blanchard Park, Tecumseh, ON
(secure dropbox by front door)



Or

Robb's Home (Drop off only)
957 Front Road South Amherstburg Ontario
(secure mailslot on garage man door)

note: do not drop off to the old address on Riverside drive)

Lovell & Associates Financial Consultants Ltd. — Annual Tax Questionnaire

Personal Data:
Full legal Name____

Address:____
____.
DID YOUR ADDRESS CHANGE FROM LAST YEARS RETURN? ☐ **YES**

Preferred contact number :____________________________ is this a cell___

Email address:____
By providing an email you consent to us contacting you
SIN # ______ - ______ - _______
US SSN or ITIN# (if applicable) _______- ________-_______

Date of Birth: Day_______ Month ________ Year______

Marital Status:
__single __married __widowed __divorced __separated__ common law

Did your marital status change this year if so what date? Date:____________

Please check all that apply to you:
__ retired __ employed __self employed __student

Did you hold foreign property over $100,000 at any time during the tax year? (including real estate) Yes___ No___

Are you a citizen of Canada ___yes ___no
Are you a citizen of:
United States citizen or green card holder yes____ no____

are you a US visa holder
Visa type_____________

Deductions: (Check all that apply for the tax year)

___ Did you contribute to an RRSP
how much: $__________ (all slips must be attached)
___ Did you incur home office expenses (provide details and (attach T2200 or T777 from your employer)

___ Did you buy back pension time in
___ Did you pay Union or Professional Dues (if yes, attach information, how much and to whom)

___ Did you pay child or spousal support (how much $_______ and to whom________________, SIN#_____________
Full legal name______________________________)

___ Child care expenses how much $___________ and to whom______________________
SIN#_________________)
If a camp provide receipt and number of weeks

___ Do you have investments made using a Personal Line of Credit (if yes, you must attach the year end statement with interest noted)
___ Did you pay investment consulting fees or custodial fees

Income Sources
Do you feel you have all your slips ___ Yes No___
(if not, please provide us details on what you think you are missing)
Employment-
___ Employment Income (are all T4 slips attached? __yes __no)
___ Commissions, Tips, other remuneration (attach full information)
___ Disability Benefits or EI
___ Did you receive support payments (spouse or child support)

Retirement Income-
___ Pension income from a corporate pension plan
___ Payments from Canada Pension Plan (CPP)
___ Payments from Old Age Security (OAS)
___ Payments from a RRIF plan

Investment Income-
___ Did you sell any stock(s)? (attach full information)
___ Are All T5 and T3 Slips for interest and dividend income attached? (If you believe slips are missing, please note what slips in the special notes below)
Notes:
____
____

Do you have:
Self employment income ___ (fill out small business questionaire)
Or rental property income ___ (fill out rental property questionaire)

VISIT 7THWAVEFINANCIAL.COM and go to the tax section for these forms

Credits:
___ Did you pay rent or property tax in (if so how much $________ and to whom__________________________)

___ Did you pay premiums for Extended Health Care or Long term care Insurance (if so, how much $____________ and to whom___________________)

___ Do you have a Home Buyers Plan? (attach assessment)
___ Do you have a Lifelong Learning Plan? (attach assessment)
___ Did you pay any tuition for yourself or for a child or dependent?
(if yes, provide details, you must attach a signed copy of your child's T2202A)
____ Did you pay quarterly installments to CRA**ear** **$____________**

____ Did you sell your principle residence

____ Did you sell a vacation home, or a rental home or investment property during the tax year? (if so provide full details on the sale as well as purchase price and date)

Please list all dependents:

Name	Date of Birth	SIN#/SSN or ITEN if applicable	Income for year	Are prepping doing a return?
				YES /_NO___.
				YES /_NO ___.