



*Making Tax & Accounting Issues Simple.  
That's Our Bottom Line!*

## **Fellowship Program (New Canadian Residents)**

Dear Client,

Thank you for your interest in Accounting Plus Financial Services.

**Accounting Plus** would be pleased to assist you with the preparation of your **Canadian Personal Income Tax Return (T1)**.

The Canadian tax system requires all individuals who earn an income to file an annual personal tax return for the fiscal year by April 30th of the following year. The personal tax return includes income, deductions and credits.

As a doctor under the fellowship program, you are required to file a personal income tax return in Canada. We have prepared a list of items below according to your fellowship status, including documentation and slips you will need to provide us with in order to file your personal tax return. Please provide us the following list of items as soon as possible, so we can start preparing your personal tax return:

<b>Personal Information</b>					
<b>Full Name</b>		<b>Date of Entry to Canada</b>			
<b>Address in Canada</b>					
<b>Current Mailing Address</b>					
<b>Phone Number</b>		<b>Email Address</b>			
<b>Date of Birth</b>		<b>Marital Status</b>			
<b>Details of Dependants</b>					
<b>Full Name</b>		<b>Date of Birth</b>		<b>Gender</b>	
<b>Full Name</b>		<b>Date of Birth</b>		<b>Gender</b>	

## Documents & Information

√	<b>Please also provide the following documents:</b>
<input type="checkbox"/>	T4 Slips & T4A Slips from Employers (Income Slips)
<input type="checkbox"/>	Work Permit & Status for ALL Family Members
<input type="checkbox"/>	Membership Fee Receipts (including CMPA, CPSO & Foreign Association Memberships)
<input type="checkbox"/>	T2202 for Tuition Fees Paid (may be obtained from university website)
<input type="checkbox"/>	Child Care Expenses
<input type="checkbox"/>	Medical Expenses (including UHIP & Other Medical Insurance Premiums)
<input type="checkbox"/>	Donation Receipts
<input type="checkbox"/>	Direct Deposit Information (if you have a Canadian bank account)
<input type="checkbox"/>	Any other items related to Canadian taxes

We have also included a link to our [Personal Income Tax Checklist](#) for a more detailed list of documents that we may require.

We highly encourage you to make an appointment with us to prepare your personal tax return as a personalized service is the best way to understand the Canadian tax system; however, if you're busy or far from our location, you can send us all tax-related documents and information by email at [info@accplus.ca](mailto:info@accplus.ca).

### ***Book an Appointment:***

- Once you receive all your slips and relevant tax documentation, please book an appointment with Accounting Plus:
  - **Website:** <http://www.accplus.ca/book-appointment>
  - **Phone:** (905) 771-1131
  - **Email:** [info@accplus.ca](mailto:info@accplus.ca)
- Please fill out the [Personal Income Tax Checklist](#) to ensure you have all documents and information ready to file your personal tax return.
- Once you complete the checklists and gathered all documents, please send us the checklist with all tax-related documents prior to coming in for your appointment.

Please be advised, our service fees for doctors under the fellowship program is **\$175 per tax return**. If your spouse is self-employed, our service fees for self-employment is **\$250 per tax return**. The fees include handling of all inquiries and reviews by the CRA during the year.

We look forward to hearing back from you!