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Fellowship Program (Departing 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 final **Personal Income Tax Return (T1)** in Canada.

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

| Personal Information | | | | | |
|----------------------------------|--|-------------------------------|--|--------|--|
| Full Name | | Date of Departure from Canada | | | |
| Current Mailing Address | | | | | |
| Date of Birth | | Marital Status | | | |
| Phone Number | | E-Mail Address | | | |
| Details of Spouse and Dependants | | | | | |
| Spouse Full Name | | Date of Birth | | SIN | |
| Dependant Full Name | | Date of Birth | | Gender | |

| Documents & Information | |
|--------------------------|--|
| √ | Please also provide the following documents: |
| <input type="checkbox"/> | T4 Slips & T4A Slips from Employers (Income Slips) |
| <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 (expenses not covered under health insurance) |
| <input type="checkbox"/> | Donation Receipts |
| <input type="checkbox"/> | Direct Deposit Information or Void Cheque (if you still have a Canadian bank account) <i>*If you are to receive a tax refund but closed your Canadian bank account, please contact the CRA at (+1) 613-940-8495 in order to receive your tax refund by cheque</i> |
| <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.

Please fill out the checklist to ensure you have all documents and information ready to file your personal tax return. If you are a new client, please fill out the personal information section.

Once you complete the personal tax checklist and gathered all documents, please send us the checklist with all tax-related documents by email at info@accplus.ca.

Please be advised, our service fees for departing doctors under the fellowship program is **\$350 per tax return**. The fees include handling of all inquiries and reviews by the CRA during the year.

Since you are not a Canadian resident anymore, we are required to paper file your tax return. Paper returns usually take between 3 to 4 months for the CRA to process.

Please do not hesitate to contact us if you have any questions.

We look forward to hearing back from you!