

	YOU	SPOUSE
Name:		
Date of Birth:		
Social Insurance #:		
Complete Address:		
Email Addresses:		
Phone #'s home:		
work:		
mobile:		

Dependents:

Name:	Relationship:	Date of Birth:	S.I.N.	Disabled?	Income:

Principal Residence Rules - The following information is required if you have sold your principal residence in the year: Date Sold, Sale Proceeds, & Date Purchased

Marital status: married___ common law___ separated___ single___ divorced___ widowed___
 Any change to marital status? _____ Date of change: _____
 Did taxpayer become deceased during the year? _____ Date of Death: _____
 Did taxpayer immigrate to or emigrate from Canada during the year? _____
 Date of Entry: _____ Date of Departure: _____
 Are you a Canadian citizen? _____ If no, citizen of what country? _____
 Do you hold investments or real property outside of Canada which originally cost in excess of CDN \$100,000? _____

INCOME INFORMATION:

Income Slips:

Please ensure you have all your income slips for the year since CRA is penalizing taxpayers for missing slips and income. It is your responsibility to ensure that we receive all your income slips.

- _____ T4 Employment Income
- _____ T4A's Pension, Retirement, Annuity, Old Age Security or Other
- _____ T4RSP or T4RIF Registered Retirement Savings Plan / Income Fund
- _____ T4E Employment Insurance Benefits
- _____ T5 Investment Income
- _____ T5007 Workers Compensation or Social Assistance
- _____ T5008 Securities transactions
- _____ T5013 Partnership Income
- _____ T3 Trust Income
- _____ Other: _____

INVESTMENT INFORMATION:

- _____ Details of all investment disposals during tax year including information to support original purchase price + cost adjustments, obtain Gain/Loss Report from your Investment Advisor and Year End Reporting Package;
- _____ Allowable business investment loss (ABIL) - if you have loaned money or invested in a Canadian small business and the company has either ceased operations or gone bankrupt, you may be entitled to a deduction for your investment. Please provide details.

SELF EMPLOYMENT INCOME: _____ Income and Expense details, net of HST if registered
 _____ HST returns if registered
 _____ Inventory at year end of goods purchased and available for sale
 _____ Details of capital assets disposed in year, eg. vehicles, equipment, computers, etc.

RENTAL INCOME: _____ Full address, number of units
 _____ Date acquired, purchase price
 _____ Revenue & expenses, including mortgage interest, insurance, property taxes, etc.
 _____ Percent of personal usage, if any

Note: If property was bought or sold during the tax year, provide purchase/sale agreement, statement of adjustments from lawyer and price allocation of value between land, building and furniture, etc.

EXPENSES - Self-employment, Employment or Commission:

YOU NEED TO KEEP RECEIPTS AS CRA MAY REQUEST THEM

_____ T2200 Statement of allowable expenses signed by employer
 _____ Meals & entertainment
 _____ Travel, promotion, conferences, dues, communications, supplies, etc.
 _____ Vehicle - vehicle mileage log w/total kms, total business kms + operating expenses, lease costs, loan interest, purchase/sale price if bought/sold during tax year
 _____ Office in home - total square footage of home & square footage of office used for business use. Mortgage interest, rent, property taxes, condo fees, utilities, insurance, general repairs & maintenance, etc.
 _____ Details of capital asset purchases in year, eg. vehicles, equipment, computers, etc
 _____ T22005 - COVID Office in Home Deduction - **Provide # of days at home**

DEDUCTIONS: _____ RRSP receipts
 _____ Child care w/supporting receipts & SIN of caregiver
 _____ Union / professional dues
 _____ Moving expenses, if moved 40 kms closer to workplace
 _____ Support payments w/copy of agreement
 _____ Accounting fees for investments or business, investment counsel fees
 _____ Legal fees to collect salary, alimony, support
 _____ Investment / business interest expense
 _____ Tax shelter deductions - tax slips & tax reporting package
 _____ Property taxes paid - 2021 final property tax bill
 _____ Rental payments - Landlord's name and amount paid during 2021

NB: Please submit receipts.

TAX CREDITS: _____ Charitable & political donation receipts
 _____ Adoption costs
 _____ Medical / dental / group insurance cost / attendant care expenses w/receipts
TIP: Ask your pharmacy to give you summary of your medications for the year
 _____ Tuition fee receipts, w/dependents income & signatures (T2202)
 _____ Disability credit form (T2201) for self or dependent (first time claims)
 _____ Home renovations for senior or disabled for friendlier/safety access
 _____ Student loan interest statement
 _____ Trades people's tools signed by employer (T2200)
 _____ First time home buyer(s)
 _____ Digital News Subscription Cost for Electronic Canadian Subscriptions (Max \$500)

MISCELLANEOUS: _____ Tax installment summary or payments information
 _____ New client: copy of prior year's tax return

OTHER:

