

	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:

NEW: TRUST REPORTING REQUIREMENT:

There is a requirement to file trust returns by April 2, 2024 if you have informal trusts or a bare Trustee, examples are:

- Parents on title of adult child's property for financing purposes
- Adult child on title on parent's property for estate planning & probate purposes
- Parents create in-trust bank accounts/Investment accounts for children which held more than \$50,000 at anytime in 2023.

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: _____

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 bought/sold in year, eg. vehicles, equipment, computers

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.

RENTAL INCOME:

- _____ Full address, number of units
- _____ Date acquired, purchase price, or sold, need lawyer's reporting letter.
- _____ Revenue & expenses, including mortgage interest, insurance, property taxes, etc.
- _____ Percent of personal usage, if any

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
- _____ T2200S - COVID Office in Home Deduction - **Provide # of days at home**

DEDUCTIONS:

- _____ RRSP receipts
- _____ First Home Savings Account receipts (FHBA)
- _____ 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 / Advisor management fees
- _____ Legal fees to collect salary, alimony, support
- _____ Investment / business interest expense
- _____ Tax shelter deductions - tax slips & tax reporting package
- _____ Property taxes paid - 2022 final property tax bill
- _____ Rental payments - Landlord's name and amount paid during 2023

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)
- _____ Caregiver Deduction for Supporting Disabled Child or Parent
- _____ 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 of Electronic Canadian Subscriptions (Max \$500)
- _____ Home renovations to allow Parents, adult child, to establish a secondary unit in the home
- _____ Teacher / Early Childhood Educator school supplies paid (Max \$1,000)