



## Other Important Matters

Are you a Canadian citizen? Yes No

Do you authorize the CRA to provide information about you to Elections Canada? Yes No

Do you own/hold foreign property with a total cost of more than \$100,000 (CAD)? Yes No

Have you made installment payments for the tax year? Yes No

If yes, how much?: \$ \_\_\_\_\_

Do you want your tax refund deposited directly to your bank account?

Yes (please provide a void cheque)

Direct deposit requested last year

No

How do you want your tax return delivered once it has been completed by us? (Please check all that apply)

Electronic copy sent to your email

Mailed to your home address

Courier to your home address

Hold for pick-up

Other (please specify): \_\_\_\_\_

## Source of Income

If you have any of the following sources of income, please check all those that apply. Please send tax slips to us in all cases.

### Source:

### Slips to attach:

Employment income ..... T4

Commission income ..... T4 or T4A

Profit sharing income ..... T4PS

Taxable disability income ..... T4A

Old Age Security ..... T4(OAS)

Canada Pension Plan ..... T4AP

Other pensions/annuities ..... T4A

Employment insurance benefits ..... T4E

Dividend income ..... T3 or T5

Interest income ..... T3 or T5

Limited partnership income ..... T5013

RRSP income ..... T4RSP

RRSP withdrawals ..... T4RSP

RRIF income ..... T4RIF

Scholarships & bursaries ..... T4A

Worker's compensation benefits ..... T5007

Social assistance payments ..... T5007

Self-employed income ..... Summarize on page 3

Rental income ..... Summarize on page 4

Sale of investments (T5008) ..... Summarize on page 4

Sale of real estate ..... Summarize on page 4

Spousal support received ..... \$ \_\_\_\_\_

Child support ..... \$ \_\_\_\_\_

Tips & gratuities ..... \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

## Deductions and Tax Credits Available

If you have any of the following deductions and tax credits, please check all those that apply. Please include receipts or supporting documents in all cases.

### Deductions and Tax Credits:

RRSP contributions

RRSP contributions - Spouse

Union dues & professional fees

Child care expenses

Moving expenses

Interest paid on investment loans

Investment counseling fees

Interest paid on student loans

Tuition fees - Self T2202

Tuition fees - Spouse/Children

Charitable donations

Political party contributions - Federal/Political

First-time home buyer's amount

Home Buyer's Plan withdrawals/payments

Lifelong Learning Plan withdrawals/payments

Employment expenses ..... Summarize on page 3

Spousal support payment ..... \$ \_\_\_\_\_

Medical expenses ..... \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

**Notes**

If you need to clarify any of your income and/or deductions OR have any other income and/or deductions that are not listed on the previous page that you need to explain, please write them in the box below. *Please attach supporting receipts.*

**Employment Expenses**

Please provide us with a signed **T2200 - Declaration of Conditions of Employment** from your employer.

Travel ..... \$ \_\_\_\_\_  
Parking ..... \$ \_\_\_\_\_  
Supplies (stationary, other) ..... \$ \_\_\_\_\_  
Telephone ..... \$ \_\_\_\_\_  
Salaries paid to an assistant ..... \$ \_\_\_\_\_  
Office rent ..... \$ \_\_\_\_\_  
Vehicle expenses ..... Summarize on this page  
Home office expenses ..... Summarize on this page

The following expenses apply to commission employees only:

Accounting & legal ..... \$ \_\_\_\_\_  
Advertising & promotion ..... \$ \_\_\_\_\_  
Meals & entertainment ..... \$ \_\_\_\_\_  
Rental of office equipment ..... \$ \_\_\_\_\_  
Training ..... \$ \_\_\_\_\_

**Vehicle Expenses**

Year, make & model: \_\_\_\_\_  
Purchase/sale price: \$ \_\_\_\_\_  
Date of purchase (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_  
**OR** Date lease began (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_  
Kilometres (km) driven for business purposes in the year:  
\_\_\_\_\_ km  
Total kilometres (km) driven in the year: \_\_\_\_\_ km

**Expenses (Annual Amount):**

Fuel ..... \$ \_\_\_\_\_  
Repairs & maintenance ..... \$ \_\_\_\_\_  
Insurance ..... \$ \_\_\_\_\_  
Licensing & registration fees ..... \$ \_\_\_\_\_  
Loan interest ..... \$ \_\_\_\_\_  
Lease payments ..... \$ \_\_\_\_\_  
Car washes ..... \$ \_\_\_\_\_  
Parking (for business purposes only) .... \$ \_\_\_\_\_  
Other ..... \$ \_\_\_\_\_

**Self-Employed Income & Expenses**

Name of Business: \_\_\_\_\_  
Type of Business: \_\_\_\_\_  
Name of Partner: \_\_\_\_\_ % owned: \_\_\_\_%  
SIN # of Partner: \_\_\_\_\_  
Business Number: \_\_\_\_\_ (if applicable)  
Access Code #: \_\_\_\_\_ (For HST/GST Return)  
Are we preparing your GST/HST Return? Yes No  
*(If yes, please attach copy of previous year's return)*

Do the following amounts below include GST/HST?

	Yes	No
Revenue .....		\$ _____

**Expenses:**

HST on sales collected ..... \$ \_\_\_\_\_  
Meals & entertainment ..... \$ \_\_\_\_\_  
Insurance ..... \$ \_\_\_\_\_  
Interest & bank charges ..... \$ \_\_\_\_\_  
Licenses, dues, memberships & subscriptions \$ \_\_\_\_\_  
Office expenses ..... \$ \_\_\_\_\_  
Supplies ..... \$ \_\_\_\_\_  
Legal, accounting & other professional fees .. \$ \_\_\_\_\_  
Rental ..... \$ \_\_\_\_\_  
Salaries ..... \$ \_\_\_\_\_  
Travel ..... \$ \_\_\_\_\_  
Telephone ..... \$ \_\_\_\_\_  
Vehicle expenses ..... Summarize on this page  
\_\_\_\_\_ \$ \_\_\_\_\_

**Home Office (For Self-Employed & Employment Expenses)**

Total % of home used for business/employment: \_\_\_\_\_%  
Total square feet of home: \_\_\_\_\_sqft  
Heat ..... \$ \_\_\_\_\_  
Hydro ..... \$ \_\_\_\_\_  
Water ..... \$ \_\_\_\_\_  
Repairs & maintenance ..... \$ \_\_\_\_\_  
Insurance ..... \$ \_\_\_\_\_  
Property taxes ..... \$ \_\_\_\_\_  
Rent ..... \$ \_\_\_\_\_  
Mortgage interest (self-employed only) ... \$ \_\_\_\_\_

## Rental Property

### Includes the Statement of Adjustments for purchase

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner                      I have a co-owner

*If you have a co-owner, please provide their details below:*

Name: \_\_\_\_\_

SIN #: \_\_\_\_\_ owned: \_\_\_\_%

Date Rental Started (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of Purchase (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Total rental income ..... \$ \_\_\_\_\_

### Expenses (Total Annual Amount)

Advertising ..... \$ \_\_\_\_\_

Insurance ..... \$ \_\_\_\_\_

Mortgage Interest ..... \$ \_\_\_\_\_

Office expenses ..... \$ \_\_\_\_\_

Legal, accounting & other professional fees \$ \_\_\_\_\_

Management & administration fees ..... \$ \_\_\_\_\_

Repairs and maintenance ..... \$ \_\_\_\_\_

Salaries, wages & benefits ..... \$ \_\_\_\_\_

Property taxes ..... \$ \_\_\_\_\_

Travel ..... \$ \_\_\_\_\_

Utilities ..... \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Major renovations & purchases (i.e. appliances):

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Sale of Real Estate

### Includes the State of Adjustments and Trust Leger for **BOTH** the sale and purchase. Also include the sale agreement and purchase agreement.

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner                      I have a co-owner

*If you have a co-owner, please provide their details below:*

Name: \_\_\_\_\_

SIN #: \_\_\_\_\_ owned: \_\_\_\_%

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Date purchased (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Total purchase price ..... \$ \_\_\_\_\_

Land transfer tax ..... \$ \_\_\_\_\_

Legal costs paid on purchase ..... \$ \_\_\_\_\_

Adjustments and/or major improvements during ownership:

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Date sold (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Sale price ..... \$ \_\_\_\_\_

Legal costs paid on sale ..... \$ \_\_\_\_\_

Commission paid on sale ..... \$ \_\_\_\_\_

Other selling expense:

\_\_\_\_\_ \$ \_\_\_\_\_

## Sale of Investments (not including investments held in your RRSP/TFSA or other registered plans)

If you have slip T5008, please fill in the details for each transaction, or summarize each portfolio.

Include the following documents for ALL NON-RRSP or NON-Registered plans:

- December 31st year end statements
- Realized gain/loss report from broker, cost of book value from broker
- Brokers statement for both purchase and sale (only if realized gain/loss report is not available)

Name of Stock	Date of Purchase (MM/DD/YY)	Date of Sale (MM/DD/YY)	Currency	# of Shares Sold	Sale Proceeds	Commissions	Cost of Shares
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____