

Personal Information

Full Name	S.I.N.	Birthdate	Citizenship
Apt./Suite - Building Number Street Name, City, Postal Code			Marital Status
Primary Phone	Secondary Phone	Fax	Email
Any Family Members Disabled?		Do you authorize CRA to provide information about you to Elections Canada?	
How many days did you work from home in 2021 due to Covid-19?			

Spouse Information

Full Name	S.I.N.	Birthdate	Citizenship
If we are not preparing your Spouse's Tax Return: Taxable income figure from line 26000 of their tax return: If your marital status changed during the year, please provide the date it changed (MM/DD/YYYY): ___/___/_____			

Children's Information

Full Name - Child 1	S.I.N.	Birthdate	Citizenship
Attending Post-Secondary Institution?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	- If yes please attach T2202A
Full Name - Child 2	S.I.N.	Birthdate	Citizenship
Attending Post-Secondary Institution?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	- If yes please attach T2202A
Full Name - Child 3	S.I.N.	Birthdate	Citizenship
Attending Post-Secondary Institution?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	- If yes please attach T2202A

Sale of Principal Residence

Did you sell your principal residence during the year?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If YES: Year of Acquisition: _____ Proceeds of Disposition: _____ Did you own any other properties that could qualify as a principal residence?		

Foreign Reporting

Do you own foreign assets with a cost greater than \$100,000 CAD?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
---	------------------------------	-----------------------------

Income Sources Checklist

Employment (T4 or T4A)	<input type="checkbox"/>	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A)	<input type="checkbox"/>
------------------------	--------------------------	------------------------------------	--------------------------

PERSONAL TAX CHECKLIST

Government Pensions (T4A[OAS]/T4A[P]) <input type="checkbox"/>	Estates/Trusts/Mutual Fund (T3) <input type="checkbox"/>
Employment Insurance (T4E) <input type="checkbox"/>	Interest/Dividends/Capital Gains (T3/T5/T5013) <input type="checkbox"/>

Income Sources Checklist

RRSP Contributions <input type="checkbox"/>	National Student Loan Interest <input type="checkbox"/>
Union/Professional Dues <input type="checkbox"/>	Medical Expenses (net of any reimbursement) <input type="checkbox"/>
Child Care Expenses <input type="checkbox"/>	Charitable or Political Donations (official receipts) <input type="checkbox"/>
Moving Expenses (if at least 40km's closer to work) <input type="checkbox"/>	First-time Home Buyer? <input type="checkbox"/>
Accounting Fees <input type="checkbox"/>	Teacher who pays for their own supplies? <input type="checkbox"/>
Interest/Fees Paid on Investments (Non-registered) <input type="checkbox"/>	Tuition Fees (T2022A - Signed by Student) <input type="checkbox"/>
Number of Days worked from home due to Covid-19 <input type="checkbox"/>	CERB/CR8 benefits repaid <input type="checkbox"/>

Other Important Documents Checklist

RRSP Contributions <input type="checkbox"/>	National Student Loan Interest <input type="checkbox"/>
Union/Professional Dues <input type="checkbox"/>	Medical Expenses (net of any reimbursement) <input type="checkbox"/>
Child Care Expenses <input type="checkbox"/>	Charitable or Political Donations (official receipts) <input type="checkbox"/>
T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid-19) <input type="checkbox"/>	Other: <input type="text"/>

Other Information Checklist *(please provide if necessary)*

T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid-19) <input type="checkbox"/>	Other: <input type="text"/>
T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid-19) <input type="checkbox"/>	Other: <input type="text"/>
T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid-19) <input type="checkbox"/>	Other: <input type="text"/>

Appendix A: Rental Property Summary* *(Please prepare this form for EACH rental income-producing property)*

DETAILS OF PROPERTY

Address of Rental Property: _____ City: _____
 Province/State: _____ Postal Code: _____ Country: _____
 Ownership Percentage (%0): _____
 Full Name and SIN of Co-owners: _____

*While you do not need to send us your individual expense receipts, please note that the Canadian Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

Appendix C: Employment Expenses*

(Please attach a signed T2200-Declaration of Employment conditions from your employer)

Travel:	\$ _____
Parking:	\$ _____
Office Supplies:	\$ _____
Telephone:	\$ _____
Office Rent:	\$ _____
Vehicle Expenses (if applicable)	
Year, Make, and Model	
Purchase/Sale Price	\$ _____
Date of Purchase/Sale	
If leased, Date Lease began?	
KMs driven for business purposes*	KMs
Total KMs driving in the year*	KMs
Fuel	\$ _____
Repairs & Maintenance	\$ _____
Insurance	\$ _____
Licensing & Registration Fees	\$ _____
Loan Interest	\$ _____
Lease Payments	\$ _____
Car Washes	\$ _____
Parking	\$ _____
Other:	\$ _____
For Commission Employees Only:	
Accounting & Legal Fees	\$ _____
Advertising & Promotion	\$ _____
Meals and Entertainment	\$ _____
Rental of Office Equipment	\$ _____
Training	\$ _____

*While you do not need to send us your individual expense receipts, please note that the Canadian Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.