

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?	

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
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Income Sources Checklist

Employment (T4 or T4A) <input type="checkbox"/>	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A) <input type="checkbox"/>
Government Pensions (T4A[OAS]/T4A[P]) <input type="checkbox"/>	Estates/Trusts/Mutual Fund (T3) <input type="checkbox"/>

PERSONAL TAX CHECKLIST

Employment Insurance (T4E)

Interest/Dividends/Capital Gains (T3/T5/T5013)

Deduction/Credit Checklist

First Time Home Savings Account

National Student Loan Interest

RRSP Contributions

Medical Expenses (net of any reimbursement)

Union/Professional Dues

Charitable or Political Donations (official receipts)

Child Care Expenses

First-time Home Buyer?

Moving Expenses (if at least 40km's closer to work)

Teacher who pays for their own supplies?

Accounting Fees

Tuition Fees (T2022A - Signed by Student)

Interest/Fees Paid on Investments (Non-registered)

CERB/CR8 benefits repaid

Other Important Documents Checklist

RRSP Contributions

National Student Loan Interest

Union/Professional Dues

Medical Expenses (net of any reimbursement)

Child Care Expenses

Charitable or Political Donations (official receipts)

T2200 Employer Authorization for Expenses
(or T2200s if worked from home due to Covid-19)

Other: _____

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 (%): _____
 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: \$ _____

OFFICE IN HOME:

Square footage of home: \$ _____
 Square footage of office space/use: \$ _____
 Utilities:
 Electricity: \$ _____
 Heating: \$ _____
 Maintenance: \$ _____
 Rent: \$ _____
 Internet fee: \$ _____
 Commission employees only: \$ _____
 Property tax \$ _____
 Home Insurance \$ _____

For Commission Employees Only:

Accounting & Legal Fees \$ _____
 Advertising & Promotion \$ _____
 Meals and Entertainment \$ _____
 Rental of Office Equipment \$ _____
 Training \$ _____

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