

LIVING SAVING TAXATION

LIVING FOR TODAY SAVING FOR TOMORROW

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Tax Information Checklist

Please complete this checklist and return with your documents.

1. Personal Information				
Name		SIN	Date of Birth	Phone (Bus.)
Taxpayer			mmddyyyy	
Spouse			mmddyyyy	
Address				Phone (Res.)
Email				

Marital Status: Married Single Common-law Separated Divorced Widowed

Did your marital status change in the year? If so, on what date? _____

If you became or ceased to be a resident of Canada in 2022, give the date of:

Entry or Departure

If this return is for a deceased person, enter the date of death:

2. Elections Canada

Are you a Canadian citizen? Yes No

If yes, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada for the National Register of Electors? Yes No

3. Foreign Reporting

Did you own or hold foreign property at any time in 2010 with a total cost of more than CAN\$100,000? Yes No

4. Dependants

Name	Relationship	Date of Birth	SIN	Disability Amount	Income
		mmddyyyy			
		mmddyyyy			
		mmddyyyy			
		mmddyyyy			

5. Prior Year Tax Return Information/Correspondence

Is a copy of last year's tax return attached? (Required if you are a new client). Yes No

Is a copy of the Notice of Assessment for last year's tax return attached? Yes No

Is a copy of any other correspondence received from CRA attached? Yes No

6. Filing and delivery instructions

Do you want your return filed electronically? Yes (no extra charge) No (\$5 processing fee)

How do you want your tax return and documentation delivered once it is complete?

I will pick it up

Mail it to my home (postage fee will be charged, approximately \$7.50)

Courier to my home (courier fee will be charged, approximately \$11.00 – may not be available for out of town)

Other (please specify) _____

7. Income/Deductions

Select items applicable

Documentation required Enclose all copies

Employment

Income from employment T4 T4A
 Employment insurance income T4E
 Professional/association fees Official receipts
 Employment expenses T2200 Complete section 8 and 10 (if applicable)

Pension

Pension/retirement income T4A(OAS) T4AP T4RIF T4A

Investment

Mutual Funds/Estate/Trust T3
 Dividends/Interest Income/CSBs T5
 Partnership/Tax Shelters T5013
 Safety deposit box Amount paid \$ _____
 Property disposed, provide details:

Description of Property	Date Acquired	Date Disposed	Sale Proceeds	Cost	Expenses for disposal

Self Employment/Rental Income

Self employment income Complete section 9 and 10 (if applicable)
 Rental income Attach details (rental income and expenses)

Other

Tuition fees T2202/T2202A
 Student loan interest Official receipt
 Universal Child Care Benefit RC62
 Charitable donations/political donations Official receipts
 Medical expenses Receipts
 Child participation in physical activity Receipts
 Public transport passes (monthly or longer) Receipts
 Alimony/support (agreement prior to May 1/97) Amount \$ _____ /yr Received Paid
 RRSP contributions or withdrawals Official receipts for contributions T4RSP
 Child care expenses Child care expense receipts (if individual need SIN)
 Property tax or rent paid in the year Amount \$ _____ # of months _____
 Name of municipality/landlord _____
 Amount of Ontario Senior Homeowner's Property Tax Grant received in 2022 \$ _____
 Did you move over 40 km closer than your previous home to your workplace? Attach details (i.e. addresses) and expenses
 Disability credit for self or dependant Disability tax credit certificate approved
 Installment payments made 2022 Installment Summary/Amount paid \$ _____
 Other information Information enclosed _____

8. Employment Expenses (Must enclose signed T2200)

Expenses			
Accounting, legal fees	\$	Advertising, promotion	\$
Meal, entertainment	\$	Lodging	\$
Parking	\$	Office supplies	\$
Telephone	\$	Other	\$

For Automobile Expenses and Home Office SEE SECTION 10

9. Self-Employed Income & Expenses

Name of Business			
Type of Business			
Registered for GST	Yes	No	GST #

Income (if registered for GST, is GST included in income Yes No)

Revenue/Sales	\$		
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Expenses (if registered for GST, is GST included in expenses Yes No)

Cost of sales (purchases)	\$	Advertising	\$
Licenses, dues, fees	\$	Insurance	\$
Interest/bank charges	\$	Meals/entertainment	\$
Office supplies	\$	Legal/accounting	\$
Rent/Occupancy Cost	\$	Salaries	\$
Telephone/Internet	\$	Travel	\$
Other _____	\$	Other _____	\$

Equipment/furniture purchases (if registered for GST, is GST included in purchases Yes No)

Description	Date Purchased	Amount
		\$
		\$

For Automobile Expenses and Home office SEE SECTION 10

10. Automobile Expenses / Office in Home Expenses**Automobile Expenses** (if registered for GST, is GST included in expenses Yes No)

Year/make of car		Purchase price	\$ <small>if new vehicle provide sales receipt</small>
Total km driven in year		Business use %	%

Expenses

Fuel	\$	Repairs	\$
Insurance	\$	Licensing	\$
Loan interest	\$	Other _____	\$
Lease payments	\$	FMV on lease date	\$
Auto allowance received	\$		

Home Office Expense (if registered for GST, is GST included in expenses Yes No)

Percent of house used	%		
Heat	\$	Hydro	\$
Water	\$	Insurance	\$
Maintenance, repairs	\$	Mortgage interest/rent	\$
Property taxes	\$	Other _____	\$

11. Rental Property Income & Expenses

Address:			
Joint owner:		Ownership share	%
Income			
Rent collected	\$	# of rental units	
Expenses			
Advertising	\$	Insurance	\$
Mortgage interest	\$	Repairs	\$
Property tax	\$	Utilities	\$
Other _____	\$	Other _____	\$

Major renovations & equipment purchases (e.g. appliances)

Description	Date Purchased	Amount
		\$
		\$

Did you sell any real estate in the year (excluding personal residence)? Yes No
 If yes, provide details on a separate sheet.