

PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR 2019 PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATIONS AS FOLLOWS:

| INCOME | |
|---|--|
| <input type="checkbox"/> T4 Employment slips and any other taxable benefits not reported on the T4 <input type="checkbox"/> T5 Investment slips <input type="checkbox"/> T4A(OAS): Old Age Security <input type="checkbox"/> T4AP: CPP Benefits <input type="checkbox"/> Other information slips (T3, T4A, T4E) <input type="checkbox"/> Pension income (Canada & Abroad) <input type="checkbox"/> Social Assistance payments <input type="checkbox"/> Workers' Compensation Benefits <input type="checkbox"/> Interest and dividends <input type="checkbox"/> Capital gains/losses record <input type="checkbox"/> Sale of real estate (proceeds, adjusted cost basis, outlays) <input type="checkbox"/> Gain / loss summary of investments | <input type="checkbox"/> Elected split pension <input type="checkbox"/> Rental income/expenses (attached worksheet) <input type="checkbox"/> RRSP withdrawals <input type="checkbox"/> Spousal support payments received <input type="checkbox"/> Child support payments received <input type="checkbox"/> Partnership income/loss (T5013) <input type="checkbox"/> Professional income/expenses (attached worksheet) <input type="checkbox"/> Commission income/expenses (attached worksheet) <input type="checkbox"/> Self-employment income/expenses (attached worksheet) <input type="checkbox"/> Farming income/expenses <input type="checkbox"/> Fishing income/expenses <input type="checkbox"/> GST Rebates received <input type="checkbox"/> Foreign Income <input type="checkbox"/> Stock options exercised |
| DEDUCTIONS | |
| <input type="checkbox"/> RRSP Contributions (up to March 1, 2020) <input type="checkbox"/> Union & professional dues <input type="checkbox"/> Child care expenses <input type="checkbox"/> Moving expenses (if >40km closer to work) <input type="checkbox"/> Child support payments made <input type="checkbox"/> Spousal support payments made <input type="checkbox"/> Investment carrying charges – interest, account fees, counsel fees | <input type="checkbox"/> Exploration and Development expenses (T101) <input type="checkbox"/> Northern residents' deduction <input type="checkbox"/> Declaration conditions of employment (T2200) <input type="checkbox"/> Employment expenses <input type="checkbox"/> Automobile logs <input type="checkbox"/> Home office receipts |
| TAX CREDITS | |
| <input type="checkbox"/> Medical expense receipts <input type="checkbox"/> Volunteer firefighter's statement <input type="checkbox"/> Search and rescue volunteers' statement <input type="checkbox"/> Public transit receipts (to June 30, 2017) <input type="checkbox"/> First-time home buyer – house purchase documents <input type="checkbox"/> Adoption expenses <input type="checkbox"/> Fertility treatment expenses <input type="checkbox"/> Disability tax credit application (T2201) – self or dependant | <input type="checkbox"/> Tuition receipts (T2202A, TL11A, TL11B, and/or TL11C) – or those forms signed by the child to transfer to the parent <input type="checkbox"/> Interest paid on student loans <input type="checkbox"/> Charitable donation receipts <input type="checkbox"/> Political donation receipts <input type="checkbox"/> Foreign taxes paid <input type="checkbox"/> Dates spent in the USA (If you vacation extensively in the USA; this will help us determine if you have any US filing requirements) |
| OTHER | |
| <input type="checkbox"/> If prior year was completed by another accountant, please provide a copy of the tax return. Other Comments: | |



RENTAL INCOME AND EXPENSES WORKSHEET (TO BE FILLED OUT FOR EACH PROPERTY)

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

| <p>RENTAL INCOME: GROSS RENTAL INCOME: _____</p> <p>RENTAL EXPENSES:</p> <p>ADVERTISING _____</p> <p>INSURANCE _____</p> <p>MORTGAGE INTEREST _____</p> <p>OFFICE EXPENSES _____</p> <p>LEGAL & ACCOUNTING _____</p> <p>MANAGEMENT & ADMIN _____</p> <p>REPAIRS & MAINTENANCE _____</p> <p>PROPERTY TAXES _____</p> <p>TRAVEL _____</p> <p>UTILITIES _____</p> <p>OTHER (SPECIFY)</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> | <p>Did you pay for any major renovations or large purchases (i.e. appliances) during the tax year?</p> <p>YES <input type="checkbox"/> NO <input type="checkbox"/></p> <p>If "YES", please provide the details of the renovations/purchase and provide the cost amount below:</p> <table border="1"> <thead> <tr> <th style="width: 20%;"></th> <th style="width: 20%; text-align: center;">Amount</th> <th style="width: 60%; text-align: center;">Description</th> </tr> </thead> <tbody> <tr> <td>\$</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>\$</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>\$</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>\$</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>\$</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>\$</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table> | | Amount | Description | \$ | _____ | _____ | \$ | _____ | _____ | \$ | _____ | _____ | \$ | _____ | _____ | \$ | _____ | _____ | \$ | _____ | _____ |
|--|---|-------------|--------|-------------|----|-------|-------|----|-------|-------|----|-------|-------|----|-------|-------|----|-------|-------|----|-------|-------|
| | Amount | Description | | | | | | | | | | | | | | | | | | | | |
| \$ | _____ | _____ | | | | | | | | | | | | | | | | | | | | |
| \$ | _____ | _____ | | | | | | | | | | | | | | | | | | | | |
| \$ | _____ | _____ | | | | | | | | | | | | | | | | | | | | |
| \$ | _____ | _____ | | | | | | | | | | | | | | | | | | | | |
| \$ | _____ | _____ | | | | | | | | | | | | | | | | | | | | |
| \$ | _____ | _____ | | | | | | | | | | | | | | | | | | | | |

While you do not need to send us your individual expense receipts, please note that Canada 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.

Renovations and other purchases may be treated as capital assets and as such cannot be expensed against the income in the year purchased but rather over time. Capital renovations will be added to the cost basis of the property and can be either amortized over time, or not amortized. We will consult you on your options regarding your preferred treatment of the property.



PROFESSIONAL / SELF-EMPLOYED INCOME AND EXPENSES WORKSHEET (TO BE FILLED OUT FOR EACH BUSINESS)

Name of business _____ Type of business _____
 Names of Partners and Percentage (%) owned _____

REVENUE:

Gross Receipts/ Sales \$ _____

EXPENSES:

Advertising \$ _____

Meals and Entertainment \$ _____

Insurance \$ _____

Interest & Bank Charges \$ _____

Licenses, Dues, and Memberships \$ _____

Office Expense \$ _____

Supplies \$ _____

Professional Dues \$ _____

Rent \$ _____

Repairs and Maintenance \$ _____

Salaries \$ _____

Travel \$ _____

Telephone and Utilities \$ _____

VEHICLE EXPENSES:

Year, Make and Model _____

Kilometers Driven for Business _____ KMs

Total Kilometers Driven _____ KMs

If Leased, Date Lease began? _____

Purchase/Sale Price \$ _____

Gas \$ _____

Insurance \$ _____

Repairs & Maintenance \$ _____

Interest on Auto Loans \$ _____

Leasing costs \$ _____

HOME OFFICE:

Square footage of office _____ SQ FT

Square footage of home _____ SQ FT

Heat / Electricity \$ _____

Maintenance \$ _____

Mortgage interest \$ _____

Property Taxes \$ _____

Is your business registered for GST? YES NO If yes, what is your GST number?

Is GST included in the above amounts? YES NO



EMPLOYMENT EXPENSES / COMMISSIONED EMPLOYEE EXPENSES (ONLY IF A T2200 IS PROVIDED AND EXPENSE DEDUCTIONS ARE DEPENDANT ON THE CONDITIONS OF EMPLOYMENT SO NOT ALL MAY BE APPLICABLE)

Travel \$ _____
 Parking \$ _____
 Office Supplies \$ _____
 Telephone \$ _____
 Office Rent \$ _____

Vehicle Expenses (If Applicable):

Year and Make & Model _____
 Purchase/Sale Price \$ _____
 Date of Purchase/Sale _____
 If leased, Date Lease began? _____
 KMs driven for business purpose _____ KMs
 Total KMs driving in the year _____ KMs
 Fuel \$ _____
 Repairs & Maintenance \$ _____
 Insurance \$ _____
 Licensing & Registration Fees \$ _____
 Loan Interest \$ _____
 Lease payments \$ _____
 Car Washes \$ _____
 Parking \$ _____

For Commission Employees only:

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

HOME OFFICE:

Square footage of office _____ SQ FT
 Square footage of home _____ SQ FT
 Heat / Electricity \$ _____
 Maintenance \$ _____
 Mortgage interest \$ _____
 Property Taxes \$ _____

Do you qualify for the GST Employer rebate? YES NO If yes, what is your employer's GST number?