



Personal Tax Checklist

PERSONAL INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Apt./Suite – Building Number Street Name, City, Postal Code			Marital Status
Phone	Email		
Any family members disabled? YES <input type="checkbox"/> NO <input type="checkbox"/>		Are you a Northern Resident? YES <input type="checkbox"/> NO <input type="checkbox"/>	
Did your marital status change during the year? YES <input type="checkbox"/> NO <input type="checkbox"/> If "YES", please provide date ____/____/____		Are we preparing a tax return for your spouse? YES <input type="checkbox"/> NO <input type="checkbox"/>	
Do you authorize CRA to provide information about you to Elections Canada? YES <input type="checkbox"/> NO <input type="checkbox"/>			
SPOUSE INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Phone	Email		
Do you authorize CRA to provide information about you to Elections Canada? YES <input type="checkbox"/> NO <input type="checkbox"/>			
If you have selected "No" above for the preparation of your spouse's tax return, please provide the following: Net income figure of his/her tax return: _____			
CHILDREN (DEPENDANT) INFORMATION			
Full Name – Child 1	S.I.N.	Birthdate	Citizenship
Are we filing their personal tax return? YES <input type="checkbox"/> NO <input type="checkbox"/>			
Full Name – Child 2	S.I.N.	Birthdate	Citizenship
Are we filing their personal tax return? YES <input type="checkbox"/> NO <input type="checkbox"/>			
Full Name – Child 3	S.I.N.	Birthdate	Citizenship
Are we filing their personal tax return? YES <input type="checkbox"/> NO <input type="checkbox"/>			
SALE OF PRINCIPAL RESIDENCE ("PR")			
Did you sell your primary residence during the year? YES <input type="checkbox"/> NO <input type="checkbox"/>			
If Yes, please provide us the following: Year of Acquisition: _____ Proceeds of Disposition: _____ Claim all years as PR? YES / NO			
FOREIGN REPORTING			
Did you own foreign assets with a cost greater than \$100,000 in the year?		YES <input type="checkbox"/> NO <input type="checkbox"/>	Spouse: YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you own in interest in a foreign affiliate at any time in the year?		YES <input type="checkbox"/> NO <input type="checkbox"/>	Spouse: YES <input type="checkbox"/> NO <input type="checkbox"/>
Please provide details of ownership of foreign assets and transactions with foreign entities. Please note that PENALTIES ARE APPLICABLE if not reported.			
TAX RETURN DELIVERY METHOD			
How do you want your tax return delivered once it has been completed by our staff? Note there is a \$5 printing fee per person, per taxation year.			
Electronic copy sent to my email above <input type="checkbox"/>		Mail to my Home Address <input type="checkbox"/>	Hold for Pick-up <input type="checkbox"/>
All returns sent to the same email? YES <input type="checkbox"/> NO <input type="checkbox"/>		Email to use _____	

PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR 2022 PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATIONS AS FOLLOWS:

HOME OFFICE AND COVID BENEFIT REPAYMENTS

- T4A/T4E for CERB/CRB (Covid-19 benefits)
 Did you repay any of the CERB to the government? If so, how much: _____
- Home office #1 – Working at home due to Covid-19, no T2200S: YES ___ NO ___ Number of days _____
- Home office #2 – Working at home due to Covid-19, with a T2200S: YES ___ NO ___
- Please provide a copy of the T2200S, and a breakdown of the home office square footage and expenses

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, 2022)
<input type="checkbox"/> Union & professional dues
<input type="checkbox"/> Childcare 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 and summaries |
|---|--|

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"/> 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 dependent
<input type="checkbox"/> Eligible Educator School supply receipts and employer attestation | <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) |
|---|--|

If your prior year return was completed by another firm, please provide a copy of the tax return filed.

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 _____

RENTAL INCOME:

GROSS RENTAL INCOME: _____

RENTAL EXPENSES:

ADVERTISING _____
 INSURANCE _____
 MORTGAGE INTEREST _____
 OFFICE EXPENSES _____
 LEGAL & ACCOUNTING _____
 MANAGEMENT & ADMIN _____
 REPAIRS & MAINTENANCE _____
 PROPERTY TAXES _____
 TRAVEL _____
 UTILITIES _____
 OTHER (SPECIFY)

Did you pay for any major renovations or large purchases (i.e. appliances) during the tax year?

YES NO

If "YES", please provide the details of the renovations/purchase and provide the cost amount below:

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 \$ _____
 Property Taxes (commission employee) \$ _____
 Home insurance (commission employee) \$ _____

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