

**PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATION 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, 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)
<p>If your prior year return was completed by another firm, please provide a copy of the tax return filed.</p>	