

Other Important Matters

Are you a Canadian citizen?	Yes	No
Do you authorize the CRA to provide information about you to Elections Canada?	Yes	No
Do you own/hold foreign property with a total cost of more than \$100,000 (CAD)?	Yes	No
Have you made installment payments for the tax year?	Yes	No

If yes, how much?: \$ _____

Source of Income

If you have any of the following sources of income, please check all those that apply. Please send tax slips to us in all cases.

Source:	Slips to attach:
Employment income	T4
Commission income	T4 or T4A
Profit sharing income	T4PS
Taxable disability income	T4A
Old Age Security	T4(OAS)
Canada Pension Plan	T4AP
Other pensions/annuities	T4A
Employment insurance benefits	T4E
Dividend income	T3 or T5
Interest income	T3 or T4
Limited partnership income	T5013
RRSP income	T4RSP
RRSP withdrawals	T4RSP
RRIF income	T4RIF
Scholarships & bursaries	T4A
Worker's compensation benefits	T5007
Social assistance payments	T5007
Self-employed income	Summarize on page 3
Rental income	Summarize on page 4
Sale of investments (T5008)	Summarize on page 4
Sale of real estate	Summarize on page 4
Spousal support received	\$ _____
Child support	\$ _____
Tips & gratuities	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____

Deductions and Tax Credits Available

If you have any of the following deductions and tax credits, please check all those that apply. Please include receipts or supporting documents in all cases.

Deductions and Tax Credits:

- RRSP contributions
- RRSP contributions - Spouse
- Union dues & professional fees
- Child care expenses
- Moving expenses
- Interest paid on investment loans
- Investment counseling fees
- Interest paid on student loans
- Tuition fees - Self T2202
- Tuition fees - Spouse/Children
- Charitable donations
- Political party contributions - Federal/Political
- First-time home buyer's amount
- Home Buyer's Plan withdrawals/payments
- Lifelong Learning Plan withdrawals/payments
- Employment expenses Summarize on page 3
- Spousal support payment \$ _____
- Medical expenses \$ _____
- Other: _____ \$ _____
- Other: _____ \$ _____
- Other: _____ \$ _____

Notes

If you need to clarify any of your income and/or deductions OR have any other income and/or deductions that are not listed on the previous page that you need to explain, please write them in the box below. *Please attach supporting receipts.*

Employment Expenses

Please provide us with a signed **T2200 - Declaration of Conditions of Employment** from your employer.

Travel \$ _____
Parking \$ _____
Supplies (stationary, other) \$ _____
Telephone \$ _____
Salaries paid to an assistant \$ _____
Office rent \$ _____
Vehicle expenses Summarize on this page
Home office expenses Summarize on this page

The following expenses apply to commission employees only:

Accounting & legal \$ _____
Advertising & promotion \$ _____
Meals & entertainment \$ _____
Rental of office equipment \$ _____
Training \$ _____

Year, make & model: _____

Purchase/sale price: \$ _____

Date of purchase (MM/DD/YY): ____/____/____

OR Date lease began (MM/DD/YY): ____/____/____

Kilometres (km) driven for business purposes in the year:
_____ km

Total kilometres (km) driven in the year: _____ km

Expenses (Annual Amount):

Fuel \$ _____
Repairs & maintenance \$ _____
Insurance \$ _____
Licensing & registration fees \$ _____
Loan interest \$ _____
Lease payments \$ _____
Car washes \$ _____
Parking (for business purposes only) \$ _____
Other \$ _____

Self-Employed Income & Expenses

Name of Business: _____

Type of Business: _____

Name of Partner: _____ % owned: ____%

SIN # of Partner: _____

Business Number: _____ (if applicable)

Access Code #: _____ (For HST/GST Return)

Are we preparing your GST/HST Return? Yes No

(If yes, please attach copy of previous year's return)

Do the following amounts below include GST/HST?

Yes No

Revenue \$ _____

Expenses:

HST on sales collected \$ _____

Meals & entertainment \$ _____

Insurance \$ _____

Interest & bank charges \$ _____

Licenses, dues, memberships & subscriptions \$ _____

Office expenses \$ _____

Supplies \$ _____

Legal, accounting & other professional fees .. \$ _____

Rental \$ _____

Salaries \$ _____

Travel \$ _____

Telephone \$ _____

Vehicle expenses Summarize on this page

_____ \$ _____

Home Office (For Self-Employed & Employment Expenses)

Total % of home used for business/employment: _____%

Total square feet of home: _____ sqft

Heat \$ _____

Hydro \$ _____

Water \$ _____

Repairs & maintenance \$ _____

Insurance \$ _____

Property taxes \$ _____

Rent \$ _____

Mortgage interest (self-employed only) ... \$ _____

Rental Property

Includes the Statement of Adjustments for purchase

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner I have a co-owner

If you have a co-owner, please provide their details below:

Name: _____
 SIN #: _____ owned: ____%

Date Rental Started (MM/DD/YY): ____/____/____

Date of Purchase (MM/DD/YY): ____/____/____

Address: _____

City: _____ Province/State: _____

Postal Code: _____ Country: _____

Total rental income \$ _____

Expenses (Total Annual Amount)

Advertising \$ _____

Insurance \$ _____

Mortgage Interest \$ _____

Office expenses \$ _____

Legal, accounting & other professional fees \$ _____

Management & administration fees \$ _____

Repairs and maintenance \$ _____

Salaries, wages & benefits \$ _____

Property taxes \$ _____

Travel \$ _____

Utilities \$ _____

Other: _____ \$ _____

Major renovations & purchases (i.e. appliances):

_____ \$ _____

_____ \$ _____

Sale of Real Estate

Includes the State of Adjustments and Trust Leger for **BOTH** the sale and purchase. Also include the sale agreement and purchase agreement.

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner I have a co-owner

If you have a co-owner, please provide their details below:

Name: _____
 SIN #: _____ owned: ____%

Address: _____

City: _____ Province/State: _____

Postal Code: _____ Country: _____

Date purchased (MM/DD/YY): ____/____/____

Total purchase price \$ _____

Land transfer tax \$ _____

Legal costs paid on purchase \$ _____

Adjustments and/or major improvements during ownership:

_____ \$ _____

_____ \$ _____

Date sold (MM/DD/YY): ____/____/____

Sale price \$ _____

Legal costs paid on sale \$ _____

Commission paid on sale \$ _____

Other selling expense:

_____ \$ _____

Sale of Investments (not including investments held in your RRSP/TFSA or other registered plans)

If you have slip T5008, please fill in the details for each transaction, or summarize each portfolio.

Include the following documents for **ALL NON-RRSP** or **NON-Registered plans**:

- December 31st year end statements
- Realized gain/loss report from broker, cost of book value from broker
- Brokers statement for both purchase and sale (only if realized gain/loss report is not available)

Name of Stock	Date of Purchase (MM/DD/YY)	Date of Sale (MM/DD/YY)	Currency	# of Shares Sold	Sale Proceeds	Commissions	Cost of Shares
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____