



Personal Tax Information

Name _____	Name _____
Date of birth _____	Date of birth _____
Cell Phone _____	Cell Phone _____
Address _____ _____	_____
Email _____	_____
Marital Status _____	_____
Dependants (1) _____	Date of birth (1) _____
Dependants (2) _____	Date of birth (2) _____
Dependants (3) _____	Date of birth (3) _____

Income

Personal

	T4 - Employment income
	Tips and gratuities
	T4A (OAS) - Old Age Security benefits
	T4A (P) - Canada Pension Plan benefits
	T4A - Pension and other income
	T4E - Employment Insurance benefits
	T5007 - WCB or Social Assistance benefits
	T4 RSP - RRSP income
	T4 RIF - RIF income
	RC 62 - Universal Child Care benefit
	T3 - Mutual Fund and Other Trusts

Other

	Business income and expenses (use checklist)
	Alimony received (include name & SIN of payer)
	Taxable child support (include name & SIN of payer)

Investment

	T5 - Interest and Dividend income
	T600 - Canada Savings Bonds
	T5008 - Statement of Security Transactions
	T5013 - Limited Partnership income
	Rental income and expenses (use checklist)
	Capital gains or losses (stocks, bonds, etc.) <small>(broker stmts/trading slips including cost and sale details)</small>
	Disposition of real estate (cost & proceeds of sale)
	Borrow money to earn investment income
	Royalty or other investment income
	RRSP withdrawals - HBP/LL
	Scholarships/bursaries
	Foreign income and taxes paid
	Overseas assets > \$100,000

Deductions & Tax Credits

	RRSP contribution receipts
	Union or professional association dues
	Alimony paid (include name & SIN of recipient)
	Deductible child support paid (include name & SIN)
	Interest paid on monies borrowed for investments
	Investment counsel and accounting fees
	Employment expenses (use checklist - T2200 required)
	T2201 - Disability Deduction
	T2202 - Tuition Fees / Education Credit
	T2202 - Tuition Fees transfer from child (form signed)
	Tuition fees over \$100 paid (post secondary)
	Interest paid on student loans
	Monthly public transit passes
	Children's fitness receipts (\$1000 max per child)
	On. Healthy Homes -
	Home Buyers Plan

	Deductible legal fees
	Childcare receipts (includes pre-school fees)
	Eligible moving expenses
	Allowable business investment losses
	Capital loss carry forwards
	Non-capital loss carry forwards
	Limited partnership losses of other years
	Employment insurance benefit repayments
	Medical, dental, etc expenses (unreimbursed amt)
	Premiums paid to private medical ins plans
	Adoption expenses
	Attendant care expenses
	Donations to registered charities
	Political contribution receipts
	Parent(s) over 65 or infirm relative live with you
	Property tax/rent