



**Income****Slips to bring****Deductions (include receipts)**

Employment income	T4	CRA tax installments	\$_____
Taxable disability	T4A	RRSP contrib (Mar-Dec current )	\$_____
Profit sharing income	T4PS	RRSP contrib (Jan-Mar next year)	\$_____
Commission income	T4 or T4A	Home Buyers Plan payment	\$_____
Old Age Security	T4A(OAS)	Union dues, Professional dues	\$_____
Canadian Pension Plan	T4A(P)	Child Care expenses	\$_____
Other pension/annuity income	T4A	Alimony payments made	\$_____
RRSP income	T4RSP	Employment expenses	see worksheet
RRIF income	T4RIF	Disability tax credit	yes      no
Withdraws from RRSP	T4RSP	Tuition fees	T2202A
EI Benefit	T4E	Medical expenses	\$_____
Worker's Compensation	T5007	Travel insurance	\$_____
Social assistance payments	T5007	Charitable donations	\$_____
Dividend income	T3-T5	Political party contributions	\$_____
Interest income	T5	Investment loan interest	\$_____
Capital Gain/Losses	T5008	Legal fees for investment loan	\$_____
Limited partnership income	T5013	Management fees for investments	\$_____
Rental income	see worksheet		
Business income	see worksheet	Tool Expenses (qualified trade)	\$_____
Sale of real estate	see worksheet	Eligible senior's home renovation	\$_____
Sale of non-RRSP mutual funds	see worksheet	Firefighter credit more than 200hrs	
Sale of non-RRSP stocks	see worksheet	Teacher supplies credit	\$_____
Alimony income	\$_____	Website URL if business income	_____
Other income: _____	\$_____	Website income	_____ %

**Other country income**

US Employment Income	W-2
US Investment income	1099
US Social security	1099R
NR investment income	1042S
Roth IRA	\$_____
German Pension	\$_____

### Rental income/expenses

Address: \_\_\_\_\_  
 \_\_\_\_\_

Joint owner: \_\_\_\_\_

Joint ownership \_\_\_\_\_%

Income \$ \_\_\_\_\_

Expenses

Advertising \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_

Repairs \$ \_\_\_\_\_

Property taxes \$ \_\_\_\_\_

Salaries \$ \_\_\_\_\_

Utilities \$ \_\_\_\_\_

Condo/Strata fees \$ \_\_\_\_\_

Other Expenses \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Major renos & purchases

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

### Sale of Real Estate

Address: \_\_\_\_\_  
 \_\_\_\_\_

Date sold: \_\_\_\_\_

Purchase date: \_\_\_\_\_

Joint owner: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

Legal costs on purchase \$ \_\_\_\_\_

Additions/improvements \$ \_\_\_\_\_

Sale Price \$ \_\_\_\_\_

Legal costs on sale \$ \_\_\_\_\_

Commission paid on sale \$ \_\_\_\_\_

Other selling expenses \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Sale of Non-RRSP Stock (please bring the whole investment package)				
Name of Stock	# of shares	Sale Price	Purchase Price	Commission Paid

### Sale or Transfer of Non-RRSP Mutual Funds

Please provide the December 31 year end statements for all your non-rrsp mutual funds. These statements were sent to you January-February by the mutual fund companies. The statements show all transactions for the year, including sale, redemption or transfer of your shares in the mutual fund during the year.

## Business Income & Expenses

Name of business: \_\_\_\_\_

Type of business: \_\_\_\_\_

Joint owner:

Joint owner \_\_\_\_\_ %

Income \$ \_\_\_\_\_

Advertising \$ \_\_\_\_\_

Licenses and dues \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Interest/bank charges \$ \_\_\_\_\_

Delivery and Freight \$ \_\_\_\_\_

Meals/Entertainment \$ \_\_\_\_\_

Office supplies \$ \_\_\_\_\_

Professional fees \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Repairs & Maintenance \$ \_\_\_\_\_

Salaries \$ \_\_\_\_\_

Supplies \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Travel \$ \_\_\_\_\_

Utilities \$ \_\_\_\_\_

Other Expenses \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Home office expenses

### Business and employment

Sq footage of business use \_\_\_\_\_

Sq footage of house \_\_\_\_\_

### Expenses

Heat \$ \_\_\_\_\_

Hydro \$ \_\_\_\_\_

Water \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Maintenance \$ \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_

Property Taxes \$ \_\_\_\_\_

Sewer \$ \_\_\_\_\_

Garbage/Recycling \$ \_\_\_\_\_

## Employment Expenses

T2200 required

Accounting \$ \_\_\_\_\_

Advertising, promotion \$ \_\_\_\_\_

Meals/Entertainment \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_

Parking \$ \_\_\_\_\_

Office Supplies \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Other Expenses

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Automobile expenses

### Business and employment

Year/Make of car: \_\_\_\_\_

Purchase Price: \$ \_\_\_\_\_

Year of Purchase \_\_\_\_\_

Total Km driven in the yr \_\_\_\_\_

Total Km driven business \_\_\_\_\_

### Expenses

Fuel \$ \_\_\_\_\_

Repairs \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Loan Interest \$ \_\_\_\_\_

Lease Payments \$ \_\_\_\_\_