**To ensure your tax return is prepared and filed on time, we must have all your information by April 16th.**

**Identification:**

Your Name: Click or tap here to enter text. Your SIN: Click or tap here to enter text.

Birth Date: Click or tap to enter a date.

Spouse’s Name: Click or tap here to enter text. Spouse’s SIN: Click or tap here to enter text.

Birth Date: Click or tap to enter a date.

Address: Click or tap here to enter text. City: Click or tap here to enter text. Prov: Choose an item.

Telephone: Click or tap here to enter text. Email: Click or tap here to enter text.

**Marital Status**

Married  Single  Separated  Divorced  Common-Law  Widowed

Did your marital status change during the year?

Yes  No  If yes, Date of change: Click or tap to enter a date.

If we are NOT preparing your spouse’s return, enter Line 236 amount: Click or tap here to enter text.

**Dependents:**

Name: Click or tap here to enter text. SIN: Click or tap here to enter text.

Date of Birth Click or tap to enter a date. Relationship: Click or tap here to enter text.

2024 Net Income (line 236): Click or tap here to enter text.

Name: Click or tap here to enter text. SIN: Click or tap here to enter text.

Date of Birth Click or tap to enter a date. Relationship: Click or tap here to enter text.

2024 Net Income (line 236): Click or tap here to enter text.

Name: Click or tap here to enter text. SIN: Click or tap here to enter text.

Date of Birth Click or tap to enter a date. Relationship: Click or tap here to enter text.

2024 Net Income (line 236): Click or tap here to enter text.

Do any dependents qualify for the Disability Tax Credit? Yes  No  If yes, who? Click or tap here to enter text.

**Delivery of Return and Other Information:**

Do you want your return e-filed? Yes  No

Did you own / hold foreign property worth more than $100,000 in 2024? Yes  No  If yes, attach details.

Do you authorize the CRA to provide your information to Elections Canada? Yes  No

Do you want your refund (if applicable) deposited to your bank account? Yes  No  if yes, attach a void cheque / direct deposit information

Hold for pickup:  Mail to home address:  Courier to home address:

**Rental Property \*\*NOTE UHT Rules (see end)**

If the property was purchased during the year, provide the purchase agreement and related information

Address: Click or tap here to enter text. City: Click or tap here to enter text. Prov: Choose an item.

Name of co-owner (if applicable) Click or tap here to enter text. % of Ownership: Click or tap here to enter text.

Total Rental Income for the 2024 Calendar Year: Click or tap here to enter text.

Expenses:

Advertising: Click or tap here to enter text. Repairs & Maintenance: Click or tap here to enter text.

Mortgage Interest: Click or tap here to enter text. Property Taxes: Click or tap here to enter text.

Insurance: Click or tap here to enter text. Utilities: Click or tap here to enter text.

Professional Fees: Click or tap here to enter text. Other: Click or tap here to enter text.

**Sale of Real Estate (Including Principal Residence)**

Provide the agreement of Purchase and Sale as well as the Solicitor’s reporting letter for both your sale and purchase

Property Sale:

Date of Sale: Click or tap to enter a date. Sale Price: Click or tap here to enter text.

Address: Click or tap here to enter text. City: Click or tap here to enter text. Prov: Choose an item.

Legal Fees: Click or tap here to enter text. Realtor Fees: Click or tap here to enter text.

Name of co-owner (if applicable) Click or tap here to enter text. % of Ownership: Click or tap here to enter text.

Was this property your Principal Residence for all of 2024? Yes  No

**Property Purchase:**

Date of Purchase: Click or tap to enter a date. Purchase Price: Click or tap here to enter text.

Address: Click or tap here to enter text. City: Click or tap here to enter text. Prov: Choose an item.

Legal Fees: Click or tap here to enter text. Realtor Fees: Click or tap here to enter text.

Name of co-owner (if applicable) Click or tap here to enter text. % of Ownership: Click or tap here to enter text.

**Sale of Securities / Other Assets**

For each brokerage account, if no T-Slip was provided, please provide the following:

Transaction summary for the year

Investment income and expense summary for the year

The December 31st statements of account

**Underused Housing Tax**

The government introduced new reporting legislation for rental properties and vacant land in an effort to reduce land speculation.

If you own more that your principal residence, you may need to report these additional properties and any income from them.

Failure to file the reports / pay the taxes can result in very LARGE penalties.

Check with your local Ledgers Professional to see if you need to file the UHT 2900 Forms.

**Small Business Income / Expenses**

Name of Business: Click or tap here to enter text. BIN (GST #): Click or tap here to enter text.

Nature of Business: Click or tap here to enter text.

Total Income for the year (including GST/HST): Click or tap here to enter text.

GST / HST Charged: Click or tap here to enter text.

Expenses:

Purchases for Resale: Click or tap here to enter text. Freight / Delivery: Click or tap here to enter text.

Advertising / Promotion: Click or tap here to enter text. Insurance: Click or tap here to enter text.

Dues & Subscriptions: Click or tap here to enter text. Telephone: Click or tap here to enter text.

Rent: Click or tap here to enter text. Utilities: Click or tap here to enter text.

Repairs / Maint. Click or tap here to enter text. Professional Fees: Click or tap here to enter text.

Bank Charges: Click or tap here to enter text. Loan Interest: Click or tap here to enter text.

Meals & Entertainment: Click or tap here to enter text. Office Supplies: Click or tap here to enter text.

Other: Click or tap here to enter text.

**Vehicle Expenses:**

Total KM driven in the year: Click or tap here to enter text.

KM Driver for Business Related Use: Click or tap here to enter text.

Description of Vehicle: Click or tap here to enter text.

Purchase Date: Click or tap here to enter text. Purchase Price: Click or tap here to enter text.

Fuel / Oil: Click or tap here to enter text. Repairs / Maintenance: Click or tap here to enter text.

Insurance: Click or tap here to enter text. Licence / Registration: Click or tap here to enter text.

**If you have a loan for this vehicle, or the vehicle is leased, please attach details**

**See the following page for Home Office Expenses**

**Employment Expenses**

For Employment expenses, please include a T2200, Declaration of Employment Conditions from your employer

Telephones: Click or tap here to enter text. Internet: Click or tap here to enter text.

Supplies Click or tap here to enter text. Meals / Entertainment: Click or tap here to enter text.

Accounting / Legal Fees: Click or tap here to enter text. Other: Click or tap here to enter text.

**If you are entitled to Automobile expenses as a condition of your employment, use the chart on the previous page.**

**Labour Mobility Deduction**

If you are involved in any of the following trades, as a tradesperson or apprentice, you may be able to deduct expenses related to relocation costs, up to a maximum of $4,000.

Construction activities include the erection, excavation, installation, alteration, modification, repair, improvement, demolition, destruction, dismantling or removal of all or any part of a building, structure, surface or sub-surface construction, or any similar property.

An eligible tradesperson is a tradesperson or an apprentice who:

* has income from employment
* performs their duties of employment in construction activities

To qualify as an eligible temporary relocation the relocation must be temporary in nature and meet all of the following conditions:

* the relocation is undertaken by the eligible tradesperson to enable them to perform their duties of employment as an eligible tradesperson at one or more temporary work locations situated in the same locality
* prior to the relocation the eligible tradesperson ordinarily resided at a residence in Canada
* the eligible tradesperson was required to be away from their ordinary residence for at least 36 hours
* during this period, the eligible tradesperson took up temporary lodging in Canada
* the distance between the eligible tradesperson’s ordinary residence and the temporary work location must be not less than 150 kilometres greater than the distance between each temporary lodging and each temporary work location of the taxpayer

**Home Office Expenses**

**Note: To qualify for Home Office Expenses, the following 2 questions must be true:**

1. it is your principal place of business?
2. Do you use the space only to earn your business income, and you use it on a regular and ongoing basis to meet your clients, customers, or patients?

If EITHER answer is no, no deductions allowed.

Total Square Footage of Home: Click or tap here to enter text.

Total Space used for Home Office: Click or tap here to enter text.

Mortgage Interest: Click or tap here to enter text. Rent: Click or tap here to enter text.

Property Taxes: Click or tap here to enter text. Insurance: Click or tap here to enter text.

Repairs / Maintenance: Click or tap here to enter text.

Utilities (Gas, Hydro, Water): Click or tap here to enter text.

Other: Click or tap here to enter text.

Use this checklist to ensure you have all the information we require to accurately complete your returns.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Sources of Income |  | Deductions & Credits |
|  |  |  |  |
|  | Employment Income (T4) |  | RRSP Contributions |
|  | Pension Income (T4P) |  | Student Loan Interest |
|  | Canada Pension (T4A (P)) |  | Investment Counselling Fees |
|  | Covid Benefits (T4A) |  | Educator School Supply Tax Credit |
|  | Old Age Security (T4OAS) |  | Child Care Expenses |
|  | Commission / Other Income (T4A) |  | Moving Expenses |
|  | Investment Income (T3 / T5) |  | Medical Expenses / Health Insurance |
|  | RRIF Income (T4RIF) |  | Union / Professional Dues |
|  | WCB Income (T5007) |  | Charitable Donations |
|  | Social Assistance Payments (T5007) |  | Political Party Contributions |
|  | Income from Partnerships (T5013) |  | Tuition / Books |
|  | Universal Child Care Benefit (RC62) |  | Rent Paid |
|  | Alimony |  | Property Taxes |
|  | Tips & Gratuities |  | Firefighter / Search & Rescue Credit |
|  | GIG Income / Expenses |  | Labour Mobility Deduction |

**Northern Residents**

Do you qualify for the Northern Residents Deduction? Yes  No

Do you qualify for the Additional Residency Amount? Yes  No

Do you qualify for the Northern Residents Travel Amounts? Yes  No  If yes, Attach receipts and full details of trips.

If you have any other income / deductions that are not listed above, attach details

**Please provide your 2023 Notice of Assessment or ensure we have access to your Personal Tax Account with the CRA through the Authorized Representative Program.**

[**You can add us as a Representative through My Account on the CRA Website**](https://www.canada.ca/en/revenue-agency/services/e-services/e-services-individuals/account-individuals.html)