

20__ Tax Information		Date:	
Required Information			
Name:		Spouse Name:	
SIN:		Spouse SIN:	
Address:			
Date of Birth (yyyy/mm/dd):		Date of Birth (yyyy/mm/dd):	
Email:		Have you sold your Principal Residence this tax year?	
Phone #:		Canadian Citizen: (Y/N):	
INCOMES			
Description Type of Claim	Forms	Yes/No	Comments / Notes
Employment Income	T4		
Other Income	T4A/P		
Old Age Security (OAS)	T4AOAS		
Elect Pension Split	T1032		
Employment Insurance Income	T4E		
Interest / Dividend Income	T3, T5		
Rental Income	T776		
RRSP Income	T4RSP		
RRIF Income	T4RIF		
Business Income - Self Employed	T2125		
Social Assistance / Worker's Comp	T5007		
Other Investment Income	T5008		
Other Income			
Deductions			
RRSP Contribution	RRSP		
Union / Professional Dues	Slip		
Child Care Expenses - T778	T778		Name & SIN of Care Giver Required:
Carrying & Interest Charges	S4		
Commission Employee Expenses	T777		
Work from Home Expenses (Covid-19)	T777S		
Employment Condition	T2200		
Employment Conditions (Covid-19)	T2200S		
Moving Expenses	Move		
Other Deductions/Expenses			
Net Capital Losses - From NOA	NOA		
Non-Refundable Tax Credit - S1			
Age Amount - person 65 or Over	S1		
Dependent Children	Dependent		Need Dependent Info:
Home Buyer Amount	S1		
Care Giver Claim	S1		Need Dependent Info:
Disability Claim	S1		Need Dependent Info:
Interest on Student Loans	S1		
Education Tuition Fee - T2022	T2202A/TL11		
Medical Expenses Claim	Medical		Break Down of Expenses:
Donation-Can Carry forward fot 5 years	Donation		Donation Receipt required:
Refundable Tax Credits			
Yearly - Rent / Propert Tax	Onben	Rent: \$	Months: Property Tax: \$
Are you 64 yrs old or Over	Onben		
Claim GST / OTB/ Property Tax	GST		
PLEASE PRINT YOUR NAME	Client Sign		
	Date		
If any question / Concern then contact:		Madan Chauhan: 1(416)624-3210 ; Email: chauhanfinancial@gmail.com	

Comments:

ATTENTION: Please save document and email to CHAUHANFINANCIAL@GMAIL.COM as an attachment.