**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.

2021 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.

2021 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.

2021 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 2021? 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**

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 2021 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 2022? 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

**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.**

**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.

Home Office Covid Benefit

Are you working from home due to Covid Restrictions? Yes [ ]  No [ ]

Claim Simple Method ($2 per day, $400 Maximum) Yes [ ]  No [ ]

Use Detailed Method (must provide expenses) Yes [ ]  No [ ]

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 |  |  |

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

**Please provide your 2021 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)