PRIDE ACCOUNTING AND TAX MANAGEMENT LTD.

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Please submit with your tax documentation

Profile Information

Last Name	First Name		SIN #
Street Address	City	Province	Postal Code
Telephone	E-mail		Date of Birth (dd/mm/yy)

Marital Status: ☐ Married ☐Single ☐Common-Law ☐Separated ☐Divorced ☐Widowed

Spouse Last Name	Spouse First Name	Spouse Date of Birth (dd/mm/yy)

If change of marital status during the year, please indicate date of change:

Dependants

DEPENDANTS, Please enter the following information for any qualifying child or qualifying relative:

Full Name	Date of Birth (dd/mm/yy)	Relationship	SIN #	Income	Child Care Expenses

Do any of the dependants have a disability?.. ☐ Yes ☐ No

Is it anticipated that a different taxpayer would seek to claim a child listed above as their dependant for this tax year?.. ☐ Yes ☐ No

Are any of the dependants transferring tuition tax credits for this tax year? .... ☐ Yes ☐ No

Residency & Elections Canada

Is the taxpayer a Canadian Citizen?.. ☐ Yes ☐ No
Taxpayer authorizes CRA to provide his/her name, address, and birthdate to Elections Canada?........ ☐ Yes ☐ No

If your province or territory of residence changed, please enter the date of your move: _______________

Foreign Property / Investments

Taxpayer owns Specified Foreign Property with a total cost of more than CND $100,000. .... ☐ Yes ☐ No
If yes, please provide information from investment advisor.

Income & Deductions

Please select the following that applies to you and provide appropriate documentation for items selected.

Income		Deductions
General		
☐ Employment Income	T4	☐ Signed T2200 or TL2 to claim Employment Expense
☐ Self-Employment & Commissions	T4A	☐ Union and Professional Dues
☐ Employment Insurance	T4E	☐ Child Care Expenses
☐ WCB/Social Assistance	T5007	☐ Moving Expenses for new employment
☐ Foreign Income		☐ Alimony/Support Payments
☐ Rental Income and Expenses		☐ Tuition Receipts (T2202)
☐ Alimony/Spousal Support		☐ RRSP Contributions
☐ U.S. Social Security		☐ Interest paid to earn Investment Income
☐ Farming/ Fishing Income and Expenses		☐ Donation Receipts
☐ Other:		☐ Carrying Charges
		☐ Disability Tax Credit
Investments		☐ Medical/Dental Receipts
☐ Trust or Estate / Mutual Fund Income	T3	☐ Extended Health Premiums
☐ Investment Income (Interests, Dividends)	T5	☐ Income Tax Installments
☐ Profit Sharing Plans Income	T4PS	☐ Children's Fitness or Art amount
☐ Partnership Income	T5013	☐ Public Transit Passes amount
☐ Security Transactions Income	T5008	☐ Statement for new home to claim home buyer's amount
☐ Other Capital Gains		☐ Other:

Were any amounts repaid during the year to a home buyers plan or lifelong learning plan? .... ☐ Yes ☐ No

Pension Information

Pension Income

☐ Pension, Retirement and Annuity Income	T4A
☐ Canada Pension Plan Benefits	T4A(P)
☐ Old-age Security Pension slip/ Foreign Pensions	T4A(OAS)
☐ Registered Retirement Savings Plan Income	T4RSP
☐ Registered Retirement Income Fund Income	T4RIF

Does the taxpayer elect to split eligible pension income with spouse or common-law partner? .... ☐ Yes ☐ No

Self-Employment / Business Income

Self-Employment Income and Expenses attached?... ☐ Yes ☐ No

Did the taxpayer use a vehicle for business?
If yes, are the vehicle expenses and business mileage attached?.. ☐ Yes ☐ No

Did the taxpayer use a portion of his/her home for business?
If yes, are the home expenses and business square footage attached? .... ☐ Yes ☐ No

Is a list of all new asset additions and deletions attached?.. ☐ Yes ☐ No

Small Business Checklist
INCOME: Invoices must be provided to accurately report business income. **EXPENSES:** Receipts must be provided in order to claim business expenses. If we are provided with a summary, amounts should be supported by receipts. General ☐ Advertising ☐ Interest (on money borrowed to operate your business) ☐ Business tax, fees, licenses, dues, memberships/subscriptions ☐ Office supplies (pens, pencils, paper, etc.) ☐ Computer & equipment lease costs (must provide lease papers) ☐ Supplies (items used to conduct your business) ☐ Legal, accounting and other professional fees ☐ Rent (business location) ☐ Maintenance and repairs (on equipment) ☐ Travel (fares, hotel meals related to business travel) ☐ Cellphone (business portion only) ☐ Postage and delivery Automobile ☐ Total kilometers driven in taxation year ☐ Total kilometers driven for business ☐ Fuel and oil ☐ Interest (must provide interest statement from bank) ☐ Maintenance and repairs ☐ Lease (must provide lease papers) ☐ Parking **Note: A vehicle logbook is required to validate kilometers driven.** Home Work Space ☐ Total area of house: _________ Total area of office: _________ ☐ Gas & Electricity ☐ Insurance ☐ Maintenance ☐ Mortgage interest ☐ Property Taxes ☐ Rent **Note: Telephone is not an allowable home work space deduction**

Rental Checklist
INCOME: Tenant receipts must be provided to accurately report rental income. **EXPENSES:** Receipts must be provided to claim rental expenses. If we are provided with a summary, amounts should be supported by receipts. General: ☐ Advertising ☐ Interest (on money borrowed to purchase property) ☐ Office supplies (pens, pencils, paper, etc.) ☐ Landscaping ☐ Accounting/bookkeeping (for rental property only) ☐ Strata fees (for condominium rentals) ☐ Maintenance and repairs ☐ Utilities (if included in rent) ☐ Property taxes ☐ Insurance Motor Vehicle: You can deduct reasonable motor vehicle expenses (with receipts) if you meet all the following conditions: ✓ You receive income from only one rental property that is in the general area where you live. ✓ You personally do part, or all, of the necessary repairs and maintenance on the property; and ✓ You have motor vehicle expenses to transport tools and materials to the rental property ☐ Total kilometers driven in taxation year ☐ Total kilometers driven for business ☐ Fuel and oil ☐ Interest on vehicle loan (must provide interest statement from bank) ☐ Insurance ☐ Maintenance and repairs ☐ Lease (must provide lease papers) **Note: A vehicle logbook is required to validate kilometers driven.**

* Additional information may be required from small business and rental property owners.

Principal residence reporting

☐ Complete address of the home sold (including postal code): Year purchased: _______________

____ Sale price:____________________

Did you open FHSA(First Home Savings Account) or made any contributions to this account. ☐ Yes ☐ No

Do you qualify for the B.C. renter's tax credit. ☐ Yes ☐ No

If you rent a place to stay during 2025, we will need:

The Rental address ____,

Rent paid at the address _________________ Number of months of tenancy at this address____________________,

Name of the landlord or company to whom the payment was made. _______________________________________

ONLY needed for first time filers or when details changed:

Would you like to have all Government Tax or Child Tax Benefits deposited directly to you bank account? ☐ Yes ☐ No If yes, please enclose a void cheque of your bank account.

<u>You can send your information by:</u>

1. **Mail or drop off at our office.**
2. **Upload it by using our secured portal. Phone our office for invite email.**
3. **Ask us to send you a secured document request email.**

IF in doubt which information to submit, add it anyway & we will look at it.

All tax returns submitted two weeks before April 30th are guaranteed to be completed.