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

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

Pension Information

Pension Income	
<input type="checkbox"/> Pension, Retirement and Annuity Income <input type="checkbox"/> Canada Pension Plan Benefits <input type="checkbox"/> Old-age Security Pension slip/ Foreign Pensions <input type="checkbox"/> Registered Retirement Savings Plan Income <input type="checkbox"/> Registered Retirement Income Fund Income	T4A T4A(P) T4A(OAS) T4RSP 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.

You can send your information by:

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.