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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   |
|---|--|
| <b>General</b>  |  |
| <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:                                   |  |
| <b>Investments</b>  |  |
| <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                      |  |
|   | <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:  |

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

\* 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 your bank account?  Yes  No  
If yes, please enclose a void cheque of your bank account.

## 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.**

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 30<sup>th</sup> are guaranteed to be completed.