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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:	<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:
<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	

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

## Pension Information

<b>Pension Income</b>	
<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**

### 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 2024, 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.

## Eligibility for Individuals to claim Home Office Expenses

As explained on the CRA website [here](#):

You are eligible to claim a deduction for home office expenses for the period you worked from home, if you meet **all** the criteria:

- **Form T2200** – The CRA is updating its webpages and Form T2200 for the 2024 taxation year. The updated form, which will be available at the end of January, is expected to be easier for employers to complete where the employee is only seeking to claim a deduction for home office expenses.
- **Eligible employees** – Employees who worked from home in 2024 are generally eligible to deduct home office expenses paid that were directly related to their work if they were required to work from home and worked from home more than 50% of the time for a period of at least four consecutive weeks in the year. This condition relieves the need for employers to closely monitor where the employee worked over an extended period of time and is consistent with the position taken by the CRA since the 2020 taxation year. Home office expenses reimbursed by the employer are not eligible for the deduction.
- The employee must be “required” to work from home. This requirement does not have to be part of the employee’s employment contract and may be a written or verbal agreement.
- **Eligible expenses** – Reasonable monthly home internet access fees continue to be eligible expenses for 2024. Information on eligible and non-eligible expenses is available on the [CRA’s website](#).

### 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 documents will be returned to you with a copy of your return.

All tax returns submitted **two weeks** before April 30<sup>th</sup> are guaranteed to be completed.