

Due to the COVID-19 Crisis - We strongly recommend uploading your documents to our secure Client Portal to reduce in-person interactions. If you have not yet registered please contact our office for an invitation.

If you are dropping off or sending a courier, we ask that you call our office to confirm our availability.

PERSONAL INFORMATION: All clients please complete the following TAX YEAR: _____

	You	Spouse
Name		
Date of Birth		
Social Insurance No.		
Marital Status		
Address		
Email address		
Phone No. -Home -Mobile -Work	_____ _____ _____	_____ _____ _____
Dependents	Please attach separately: Names, social insurance numbers, birth dates & net income of all dependents	

Are all individuals Canadian citizens? YES or NO

Do you hold investments or real property outside Canada which has a value more than \$100,000 CDN (including Bitcoin)? YES or NO

Did you buy or sell a real estate property in the tax year? YES or NO

Is there a financial planner we can contact regarding your investments?

Name _____ Tel # _____

DOCUMENTS TO BE PROVIDED

NEW TAX CLIENT (If we did not prepare your return in the previous tax year)

Please provide a copy of prior year tax return including carryforward details such as donations, losses, RRSP contributions, etc. and a copy of the corresponding Notice of Assessment.

EMPLOYMENT / OTHER INCOME

Income slips (T4, T4A, T4AP, T4E, T4RSP, T4RIF, T4AOAS, T4PS, T5007, T5013) Stock option / benefit plan statement from employer

INVESTMENT INCOME

Full & complete tax packages for all non-registered investment accounts including all income slips issued for the tax year (T3, T5, T5008)

Realized gain/loss report for all investments sold this year (You can request a copy from your financial advisor)

****IMPORTANT**** Please review the investment slips and tax package with your financial planner and confirm with them that you have received all of your investment slips before authorizing us to begin preparing your return.

EMPLOYMENT EXPENSES

T2200 - Conditions of Employment form signed by employer

Temporary flat rate method (simple): Canada Revenue Agency (CRA) recently announced a temporary simplified method that will allow employees who worked at home due to COVID-19 more than 50 percent of the time for at least four consecutive weeks during the pandemic. For most employees, this simplified method will provide the maximum deduction allowed without a T2200 or detailed record-keeping normally required for home office deduction claims. Working days include any day during which an employee performs work, at their home, for the employer. There are no minimum hours attached to this, both full-time and part-time employees may count any day on which they performed work for the employer. Non-working days such as weekends, statutory holidays, vacation, or sick days are NOT counted. Claim of \$2 per working day (up to a maximum of \$400 for 2020 and \$500 for 2021).

Please indicate:

Name: _____ Number of days being claimed: _____

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Detailed method: T2200S - Conditions of Employment form signed by employer. Please request the additional specific checklist.

SELF-EMPLOYED or RENTAL INCOME

If you have self-employment and/or rental income please contact our office and request the additional specific checklists.

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DEDUCTIONS

- RSP receipts
- Childcare, with supporting receipts and SIN of caregiver
- Adoption costs
- Union/membership dues
- Moving expenses (contact us for a detailed list)
- Alimony/support payments, with copy of agreement if not previously provided
- Legal fees to collect salary, alimony, support
- Accounting fees, investment counsel fees
- Investment/business interest expense
- Tax shelter deductions - tax slips and tax reporting package
- Trades people's tools

TAX CREDITS

- Charitable and political donation receipts
- Medical/dental/attendant care expenses with receipts
- Tuition fee receipt (T2202), with dependent's income and signatures
- Disability credit form (T2201) for self or dependents for first-time claims
- Student loan interest statement
- Names and birth dates for children under age 18
- For seniors or disabled individuals residing on their own, or with family members, receipts for home renovations to improve accessibility
- Indicate if eligible for first-time home buyers' credit for this year
- Indicate if family member (other than child) resides with you or is dependent on you
- Current year rent/property tax information if eligible for Ontario tax credits

I hereby declare that the information provided is true and correct. I also understand that CRA may request supporting documents such as receipts and contracts related to my tax return.

Name: _____ Signature: _____ Date: _____
Name: _____ Signature: _____ Date: _____

IMPORTANT

Please confirm via email that we have all your documents, slips and receipts before we begin preparing your return. This will prevent unnecessary adjustments possibly resulting in added fees and processing delays.

Please select one method of providing your documents to our office, as it will help us keep track of your documents.

If you have any questions, please contact us.

Thank you for your business!

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