


Income Tax Preparation Services

*asterisk denotes required field

Title	Full Name *				SIN *
	First Name and Initials Last Name				
Date of birth *		Disability Tax Credit? *	Address Change? *	Home Office? *	T2200 *
Month Day Year		YES NO	YES NO	YES NO	YES NO

Address *	US Citizen? *	RRSP Homebuyer's or Learning Plan? *	Disopse of or change use of a principal residence? *
Street Address	YES NO	YES NO	YES NO
City			
Province			

Spouse Information (Name, SIN, DOB)

Postal Code

Required, if applicable

Marital Status *	Spouse taxes prepared together *	Marital Status Change? *	Same sex partner
		YES NO	YES NO

Types of Income		Did you own or hold specified foreign property where the total cost amount of all such property, at any time in this tax year, was more than CAN\$100,000? *
Employment	Self-Employed	
Commission	Pension	
Rental	Passive Investment	YES NO
Other		

Dependent Information (Name, SIN, DOB)

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Please include additional details and considerations

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General Tax Checklist

Slips

T4 Slips (employment income)	Employment Insurance Benefits (T4E)
CERB/CRB Benefits (T4E)	Interest, Dividends, Mutual Funds (T3, T5, T5008)
Limited Partnership Income (T5013)	Tuition Education Receipts (T2202A)
Universal ChildCare Benefit (RC62)	OAS and CPP Benefits (T4OAS, T4CPP)
Other Pensions and Annuities (T4A)	Social Assistance Payments (T5007)
Worker's Compensation Benefits (T5007)	All other Information Slips

Receipts

RRSP Contribution Receipts	Support for Child, Spouse or Common-Law
Professional or Union Dues	Tool Expenses (tradespersons)
Medical Expenses	Transit Pass Receipts
Charitable Donations	Political Contributions
Child Care Expenses	Adoption Expenses
Children's Arts and Sports Programs	Moving Expenses
Interest Paid on Student Loans	Carrying Charges and Interest Expenses
Office - in-home expenses	Exams for Professional Certifications

Other Documentation

A Copy of your previous year's return	Notice of Assessment/Reassessment
CRA Correspondence	Sale of stocks, bonds or real estate
Northern residents deductions receipts	Business, farm or fishing income/expenses
Automobile / Travel logbook and expenses	Disability Tax Credit Certificate
Conditions of Employment (T2200)	Volunteer Firefighters certification
Search and Rescue volunteers certification	Custody Arrangement documentation

Rental Property Checklist

Address of Rental	Purchase Price and Year of Purchase	Percentage Ownership of the Property (%)
Street Address		
City	Total Amount of Rents Collected in the year	Rental Period (example: January 4 to September 15)
Province		
Postal Code		

Rental Property Expenses

Rents Collected	Mortgage Interest	Bank Charges
Office Expenses	Professional Fees (Legal/Accounting)	Management/Administration Fees
Condo Fees	Insurance	Utilities
Property Taxes	Maintenance and Repairs	Transportation/Travel
Advertising	Accessibility Improvements	Motor Vehicle Expenses
Prepaid Expenses	Other Rental Expenses	Capital Property Improvements

Home Office Checklist

Type of Income Earned at Home	Percentage of Home used for Office (%)	Number of months worked from home in the year
Salary		
Commission		
Self-Employed		

Home Office Expenses

Rent	Mortgage Interest
Condo Fees	Home Insurance
Property Taxes	Utilities - Water, Heat/Gas, Hydro
Phone and Internet	Maintenance
Office Expenses/Supplies	Other Home Office Expenses

Motor Vehicle Expenses

Make, Model, and Year

Year of Acquisition

Number of kms driven in tax year

Date of disposition (if disposed)

Number of kms driven in tax year for business

Please include additional details and considerations