



## Other Important Matters

Are you a Canadian citizen? Yes No  
 Do you authorize the CRA to provide information about you to Elections Canada? Yes No  
 Do you own/hold foreign property with a total cost of more than \$100,000 (CAD)? Yes No  
 Have you made installment payments for the tax year? Yes No  
 If yes, how much?: \$ \_\_\_\_\_

Do you want your tax refund deposited directly to your bank account? Transit # Inst. # Account #  
Yes (please provide a void cheque or direct deposit) Direct deposit requested last year No

How do you want your tax return delivered once it has been completed by us? (Please check all that apply)

- Electronic copy sent to your email Mailed to your home address Courier to your home address  
 Hold for pick-up Other (please specify): \_\_\_\_\_

## Source of Income

If you have any of the following sources of income, please check all those that apply. Please send tax slips to us in all cases.

Source:	Slips to attach:
Employment income .....	T4
Commission income .....	T4 or T4A
Profit sharing income .....	T4PS
Taxable disability income .....	T4A
Old Age Security .....	T4(OAS)
Canada Pension Plan .....	T4AP
Other pensions/annuities .....	T4A
Employment insurance benefits .....	T4E
Dividend income .....	T3 or T5
Interest income .....	T3 or T5
Limited partnership income .....	T5013
RRSP income .....	T4RSP
RRSP withdrawals .....	T4RSP
RRIF income .....	T4RIF
Scholarships & bursaries .....	T4A
Worker's compensation benefits .....	T5007
Social assistance payments .....	T5007
Self-employed income .....	Summarize on page 3
Rental income .....	Summarize on page 4
Sale of investments (T5008) .....	Summarize on page 4
Sale of real estate .....	Summarize on page 4
Spousal support received .....	\$ _____
Child support .....	\$ _____
Tips & gratuities .....	\$ _____
Other: _____ .....	\$ _____
Other: _____ .....	\$ _____
Other: _____ .....	\$ _____
Other: _____ .....	\$ _____
Other: _____ .....	\$ _____

## Deductions and Tax Credits Available

If you have any of the following deductions and tax credits, please check all those that apply. Please include receipts or supporting documents in all cases.

**Deductions and Tax Credits:**

RRSP contributions  
 RRSP contributions - Spouse  
 Union dues & professional fees  
 Child care expenses  
 Moving expenses  
 Interest paid on investment loans  
 Investment counseling fees  
 Interest paid on student loans  
 Tuition fees - Self T2202  
 Tuition fees - Spouse/Children  
 Charitable donations  
 Political party contributions - Federal/Political  
 First-time home buyer's amount  
 Home Buyer's Plan withdrawals/payments  
 Lifelong Learning Plan withdrawals/payments  
 Employment expenses ..... Summarize on page 3  
 Spousal support payment ..... \$ \_\_\_\_\_  
 Medical expenses ..... \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ ..... \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ ..... \$ \_\_\_\_\_  
 Other: \_\_\_\_\_ ..... \$ \_\_\_\_\_

**Notes**

If you need to clarify any of your income and/or deductions OR have any other income and/or deductions that are not listed on the previous page that you need to explain, please write them in the box below. *Please attach supporting receipts.*

**Employment Expenses**

Please provide us with a signed **T2200 - Declaration of Conditions of Employment** from your employer.

Travel ..... \$ \_\_\_\_\_  
Parking ..... \$ \_\_\_\_\_  
Supplies (stationary, other) ..... \$ \_\_\_\_\_  
Telephone ..... \$ \_\_\_\_\_  
Salaries paid to an assistant ..... \$ \_\_\_\_\_  
Office rent ..... \$ \_\_\_\_\_  
Vehicle expenses ..... Summarize on this page  
Home office expenses ..... Summarize on this page

The following expenses apply to commission employees only:

Accounting & legal ..... \$ \_\_\_\_\_  
Advertising & promotion ..... \$ \_\_\_\_\_  
Meals & entertainment ..... \$ \_\_\_\_\_  
Rental of office equipment ..... \$ \_\_\_\_\_  
Training ..... \$ \_\_\_\_\_

**Vehicle Expenses**

Year, make & model: \_\_\_\_\_  
Purchase/sale price: \$ \_\_\_\_\_  
Date of purchase (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_  
**OR** Date lease began (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_  
Kilometres (km) driven for business purposes in the year:  
\_\_\_\_\_ km  
Total kilometres (km) driven in the year: \_\_\_\_\_ km

**Expenses (Annual Amount):**

Fuel ..... \$ \_\_\_\_\_  
Repairs & maintenance ..... \$ \_\_\_\_\_  
Insurance ..... \$ \_\_\_\_\_  
Licensing & registration fees ..... \$ \_\_\_\_\_  
Loan interest ..... \$ \_\_\_\_\_  
Lease payments ..... \$ \_\_\_\_\_  
Car washes ..... \$ \_\_\_\_\_  
Parking (for business purposes only) .... \$ \_\_\_\_\_  
Other ..... \$ \_\_\_\_\_

**Self-Employed Income & Expenses**

Name of Business: \_\_\_\_\_  
Type of Business: \_\_\_\_\_  
Name of Partner: \_\_\_\_\_ % owned: \_\_\_\_%  
SIN # of Partner: \_\_\_\_\_

Business Number: \_\_\_\_\_ (if applicable)  
Access Code #: \_\_\_\_\_ (For HST/GST Return)

Are we preparing your GST/HST Return?    Yes            No  
*(If yes, please attach copy of previous year's return)*

Do the following amounts below include GST/HST?

	Yes	No
Revenue .....		\$ _____

**Expenses:**

HST on sales collected ..... \$ \_\_\_\_\_  
Meals & entertainment ..... \$ \_\_\_\_\_  
Insurance ..... \$ \_\_\_\_\_  
Interest & bank charges ..... \$ \_\_\_\_\_  
Licenses, dues, memberships & subscriptions \$ \_\_\_\_\_  
Office expenses ..... \$ \_\_\_\_\_  
Supplies ..... \$ \_\_\_\_\_  
Legal, accounting & other professional fees .. \$ \_\_\_\_\_  
Rental ..... \$ \_\_\_\_\_  
Salaries ..... \$ \_\_\_\_\_  
Travel ..... \$ \_\_\_\_\_  
Telephone ..... \$ \_\_\_\_\_  
Vehicle expenses ..... Summarize on this page  
\_\_\_\_\_ \$ \_\_\_\_\_

**Home Office (For Self-Employed & Employment Expenses)**

Total % of home used for business/employment: \_\_\_\_\_%  
Total square feet of home: \_\_\_\_\_ sqft  
Heat ..... \$ \_\_\_\_\_  
Hydro ..... \$ \_\_\_\_\_  
Water ..... \$ \_\_\_\_\_  
Repairs & maintenance ..... \$ \_\_\_\_\_  
Insurance ..... \$ \_\_\_\_\_  
Property taxes ..... \$ \_\_\_\_\_  
Rent ..... \$ \_\_\_\_\_  
Mortgage interest (self-employed only) ... \$ \_\_\_\_\_

## Home Office Expenses (During the COVID-19 Pandemic)

Please select one of the following options that you would like to claim:

- 1) A temporary flat rate of \$2.00 for each day you worked from home in 2023 due to the COVID-19 pandemic, up to a maximum of \$500.00 to cover all of your home office expenses **(Not applicable for 2023 year, only 2022-2020)**
  - 2) Home office expenses you paid while working at home due to the COVID-19 pandemic, and you have supporting documents
  - 3) Home office expenses, and may have other employment expenses to claim (such as motor vehicle expense), and you have supporting documents
- 

Conditions of Employment:

- 1) Did this employee work from home due to COVID-19?
  - 2) Did you or will you reimburse this employee for any of their home office expenses?
  - 3) Was the amount included on this employee's T4 Slip?
- 

Please Select One of the Following Options:

- 1) **Simplified Method (Not applicable for 2023 year, only 2022-2020)**
  - o \$2.00 x Total Number of Days You Worked From Home Due To COVID-19
- 2) **Detailed Method:**     [How To Claim - link](#)
  - o Worked more than 50% of the time from home for a period of at least a month (four consecutive weeks) in 2023. The period can be longer than a month.
  - o Have a completed and signed T2200 Form, Declaration of Conditions of Employment for working from home due to COVID-19, from your employer
  - o Kept all your supporting documents

Expenses :

- Electricity, heat, water, Internet fees \_\_\_\_\_
  - Maintenance (cleaning supplies, light bulbs etc) \_\_\_\_\_
  - Home insurance (applies to commission employee only) \_\_\_\_\_
  - Property Taxes \_\_\_\_\_
  - Office supplies (postage, stationery supplies etc) \_\_\_\_\_
  - Other expenses (rent etc) \_\_\_\_\_
-

## Rental Property

### Includes the Statement of Adjustments for purchase

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner                      I have a co-owner

If you have a co-owner, please provide their details below:

Name: \_\_\_\_\_

SIN #: \_\_\_\_\_ owned: \_\_\_\_%

Date Rental Started (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of Purchase (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Total rental income ..... \$ \_\_\_\_\_

### Expenses (Total Annual Amount)

Advertising ..... \$ \_\_\_\_\_

Insurance ..... \$ \_\_\_\_\_

Mortgage Interest ..... \$ \_\_\_\_\_

Office expenses ..... \$ \_\_\_\_\_

Legal, accounting & other professional fees \$ \_\_\_\_\_

Management & administration fees ..... \$ \_\_\_\_\_

Repairs and maintenance ..... \$ \_\_\_\_\_

Salaries, wages & benefits ..... \$ \_\_\_\_\_

Property taxes ..... \$ \_\_\_\_\_

Travel ..... \$ \_\_\_\_\_

Utilities ..... \$ \_\_\_\_\_

Other: \_\_\_\_\_ \$ \_\_\_\_\_

Major renovations & purchases (i.e. appliances):

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Sale of Real Estate

### Includes the State of Adjustments and Trust Leger for **BOTH** the sale and purchase. Also include the sale agreement and purchase agreement.

Please indicate if you are the sole owner of the property or if you have a co-owner:

I'm the sole owner                      I have a co-owner

If you have a co-owner, please provide their details below:

Name: \_\_\_\_\_

SIN #: \_\_\_\_\_ owned: \_\_\_\_%

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Date purchased (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Total purchase price ..... \$ \_\_\_\_\_

Land transfer tax ..... \$ \_\_\_\_\_

Legal costs paid on purchase ..... \$ \_\_\_\_\_

Adjustments and/or major improvements during ownership:

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Date sold (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Sale price ..... \$ \_\_\_\_\_

Legal costs paid on sale ..... \$ \_\_\_\_\_

Commission paid on sale ..... \$ \_\_\_\_\_

Other selling expense:

\_\_\_\_\_ \$ \_\_\_\_\_

## Sale of Investments (not including investments held in your RRSP/TFSA or other registered plans)

If you have slip T5008, please fill in the details for each transaction, or summarize each portfolio.

Include the following documents for ALL NON-RRSP or NON-Registered plans:

- December 31st year end statements
- Realized gain/loss report from broker, cost of book value from broker
- Brokers statement for both purchase and sale (only if realized gain/loss report is not available)

Name of Stock	Date of Purchase (MM/DD/YY)	Date of Sale (MM/DD/YY)	Currency	# of Shares Sold	Sale Proceeds	Commissions	Cost of Shares
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____
_____	____/____/____	____/____/____	_____	_____	\$ _____	\$ _____	\$ _____