

PERSONAL INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Apt./Suite – Building Number Street Name, City, Postal Code			Marital Status
Primary phone	Secondary phone	Fax	Email
Any family members disabled? YES <input type="checkbox"/> NO <input type="checkbox"/>		Do you authorize CRA to provide information about you to Elections Canada? YES <input type="checkbox"/> NO <input type="checkbox"/>	
SPOUSE'S INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
If we are not preparing your spouse's tax return: Taxable income figure from line 26000 of their tax return: _____			
If your marital status changed during the year, please provide the date it changed (MM/DD/YYYY): ____/____/____			
CHILDREN'S INFORMATION			
Full Name – Child 1	S.I.N.	Birthdate	Email
Attending Post-Secondary Institution? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			
Full Name – Child 2	S.I.N.	Birthdate	Email
Attending Post-Secondary Institution? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			
Full Name – Child 3	S.I.N.	Birthdate	Email
Attending Post-Secondary Institution? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			
SALE OF PRINCIPAL RESIDENCE			
Did you sell your principal residence during the year?			YES <input type="checkbox"/> NO <input type="checkbox"/>
If YES: Year of Acquisition: _____ Proceeds of Disposition: _____			
Did you own any other properties that could qualify as a principal residence?			YES <input type="checkbox"/> NO <input type="checkbox"/>
FOREIGN REPORTING			
Do you own foreign assets with a cost greater than \$100,000 CAD?			YES <input type="checkbox"/> NO <input type="checkbox"/>
INCOME SOURCES CHECKLIST			
Employment (T4 or T4A)	<input type="checkbox"/>	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A)	<input type="checkbox"/>
Government pensions (T4A[OAS]/T4A[P])	<input type="checkbox"/>	Estates/Trusts/Mutual Fund (T3)	<input type="checkbox"/>
Employment Insurance (T4E)	<input type="checkbox"/>	Interest/Dividends/Capital Gains (T3/T5/T5013)	<input type="checkbox"/>
TAX DEDUCTIONS / CREDITS CHECKLIST (with official receipts)			
RRSP Contributions	<input type="checkbox"/>	National Student Loan Interest	<input type="checkbox"/>
Union/Professional Dues	<input type="checkbox"/>	Medical Expenses (net of any reimbursements)	<input type="checkbox"/>
Child Care Expenses (Incl. Name & SIN of Recipient)	<input type="checkbox"/>	Charitable or Political Donations (official receipts)	<input type="checkbox"/>
Moving Expenses (if at least 40km's closer to work)	<input type="checkbox"/>	First-time Home Buyer?	<input type="checkbox"/>
Accounting Fees (other than Lohn Caulder's fees)	<input type="checkbox"/>	Eligible educator who pays for their own supplies?	<input type="checkbox"/>
Interest/Fees Paid on Investments (Non-Registered)	<input type="checkbox"/>	Tuition Fees (T2202A – Signed by Student)	<input type="checkbox"/>
Number of days worked from home due to Covid 19 (250 days max for 2022)	<input type="checkbox"/>	Government Subsidy benefits (ie. CERB / CRB) repaid	<input type="checkbox"/>

OTHER IMPORTANT DOCUMENTS CHECKLIST			
Mutual Fund Investment Summary Statement	<input type="checkbox"/>	Tax Shelters (T101/T5013/Annual Reports)	<input type="checkbox"/>
Sale of Property: Address, Cost of property	<input type="checkbox"/>	T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid 19) (Please see Appendix C below)	<input type="checkbox"/>
Sale of Property: Seller's Statement of Adjustments	<input type="checkbox"/>	Court-Ordered Spousal Support Payments <i>Paid</i>	<input type="checkbox"/>
Sale of Shares: Gain/Loss Summary from Broker	<input type="checkbox"/>	Court-Ordered Spousal Support Payments <i>Received</i>	<input type="checkbox"/>
New Clients: Notice of Assessment for Prior Year	<input type="checkbox"/>	New Clients: T1 Tax Return Filed for Prior Year	<input type="checkbox"/>
New Clients: Signed CRA Authorization Form (Included after Appendix C below)	<input type="checkbox"/>	Other:	<input type="checkbox"/>

OTHER INFORMATION CHECKLIST (please provide if necessary)			
Rental Income and Expenses (Please provide detail listing of rental income and expenses per property below in Appendix A)	<input type="checkbox"/>	List of foreign property owned, including:	
Self-Employment Income and Expenses (Please provide detail listing of the income and expenses below in Appendix B)	<input type="checkbox"/>	Country of Origin	
Employment/Commission Expenses (Please provide detail listing of employment expenses in Appendix C)	<input type="checkbox"/>	Fair Market Value at Year-End	
Other:	<input type="checkbox"/>	Highest Fair Market Value for The Year	
Other:	<input type="checkbox"/>	Total Income and Total Capital Gains	
		Signed T1 Engagement Letter (available online)	<input type="checkbox"/>
		Other:	<input type="checkbox"/>
		Other:	<input type="checkbox"/>

INSTALLMENT PAYMENTS	
Have you made installment payments for the tax year? If YES: how much for yourself? If YES: how much for your spouse? If YES: how much for each child?	YES <input type="checkbox"/> NO <input type="checkbox"/> \$ _____ \$ _____ \$ _____

DIRECT DEPOSIT/ TAX REFUND	
Has Your Direct Deposit Information Already Been Provided to CRA? If NO: If You Would Like to Have Tax Refunds Directly Deposited, provide us with either: A Void Cheque <i>OR</i> Branch Number (5 digits) Institution Number (3 digits) Account Number (Maximum 12 digits)	YES <input type="checkbox"/> NO <input type="checkbox"/> <input type="checkbox"/>

APPENDIX A: RENTAL PROPERTY SUMMARY* (Please prepare this form for EACH rental income-producing property)

<u>DETAILS OF PROPERTY</u>		
Address of Rental Property:		City
Province/State	Postal Code	Country
Ownership Percentage (%)		
Full Name and SIN of Co-Owners		
<u>RENTAL INCOME:</u>		Did you pay for any major renovations or large purchases (i.e. appliances) during the tax year? YES <input type="checkbox"/> NO <input type="checkbox"/>
Gross Rental Income	\$	
<u>RENTAL EXPENSES:</u>		If "YES", please provide the details of the renovations/purchase and provide the cost amount below: Renovation/Purchase Amount Description \$ \$ \$ \$ \$ \$ \$
Advertising	\$	
Insurance	\$	
Mortgage Interest	\$	
Office Expense	\$	
Legal & Accounting	\$	
Management & Admin	\$	
Repairs & Maintenance	\$	
Property Taxes	\$	
Travel	\$	
Utilities	\$	
Other (please specify)	\$	
Net Rental Income	\$	

* While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

APPENDIX B: SELF-EMPLOYED INCOME AND EXPENSES (Please provide this form for EACH Business)

<u>DETAILS OF BUSINESS:</u>	
Name of business	Type of business
Names of Partners and Percentage (%) owned	
<u>REVENUE:</u>	
Gross Receipts/ Sales	\$
<u>EXPENSES:</u>	
Bad Debts	\$
Insurance	\$
Meals and Entertainment	\$
Interest & Bank Charges	\$
Licenses, Dues, and Memberships	\$
Office Expense	\$
Supplies	\$
Professional Dues	\$
Rent	\$
Repairs and Maintenance	\$
Salaries	\$
Travel	\$
Telephone and Utilities	\$
Vehicle Expenses:	
Year, Make and Model	
Kilometers Driven for Business	KMs
Total Kilometers Driven	KMs
If Leased, Date Lease began?	
Purchase/Sale Price	\$
Gas	\$
Insurance	\$
Repairs & Maintenance	\$
Interest on Auto Loans	\$
Leasing	\$
Is your business registered for GST?	YES <input type="checkbox"/> NO <input type="checkbox"/> If yes, what is your GST number? _____
Is GST included in the above amounts?	YES <input type="checkbox"/> NO <input type="checkbox"/>

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APPENDIX C: EMPLOYMENT EXPENSES* (Please attach a signed T2200-Declaration of Employment conditions from your employer)

Travel	\$	
Parking	\$	
Office Supplies	\$	
Telephone	\$	
Office Rent	\$	
Vehicle Expenses (If Applicable):		
Year and Make & Model		
Purchase/Sale Price	\$	
Date of Purchase/Sale		
If leased, Date Lease began?		
KMs driven for business purpose*		Km's
Total KMs driving in the year*		Km's
Fuel	\$	
Repairs & Maintenance	\$	
Insurance	\$	
Licensing & Registration Fees	\$	
Loan Interest	\$	
Lease payments	\$	
Car Washes	\$	
Parking	\$	
Other:	\$	
For Commission Employees only:		
Accounting & Legal Fees	\$	
Advertising & Promotion	\$	
Meals and Entertainment	\$	
Rental of Office Equipment	\$	
Training	\$	

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