

# Canadian Personal Tax Information Checklist

To help us assemble your financial information for the preparation of your personal income tax return, please complete this information sheet. It should be completed and returned to us together with all relevant tax slips.



## Personal Contact

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Gender: ☐ Male ☐ Female ☐ Other

SIN Number: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ (YYYY/MM/DD)

Your Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

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

City: \_\_\_\_\_

Province/State: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Country: \_\_\_\_\_

Spouse First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Gender: ☐ Male ☐ Female ☐ Other

SIN Number: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ (YYYY/MM/DD)

Spouse Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

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

City: \_\_\_\_\_

Province/State: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Country: \_\_\_\_\_

Did you move in the Year? Yes ☐ No ☐ If Yes, Provide Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ (YYYY / MM/ DD)

Departure Country: \_\_\_\_\_

Arrival Country: \_\_\_\_\_

Marital Status: ☐ Married ☐ Common Law ☐ Widowed ☐ Divorced ☐ Separated ☐ Single

Did Your Marital Status Change during the year? ☐ Yes ☐ No IF Yes, Provide Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ (YYYY/MM/DD)

Are we preparing tax return for your spouse? IF No, Please provide the Net Taxable Income of Last Year \$ \_\_\_\_\_

**If Yes, Please also fill your spouse details in this form.**

List All dependents

Name	Relationship	Birthday (YYYY/MM/DD)	SIN#	Net Income During Year
_____	_____	____/____/____	_____	_____
_____	_____	____/____/____	_____	_____
_____	_____	____/____/____	_____	_____
_____	_____	____/____/____	_____	_____

Do you or your spouse or any of your dependents qualify for the disability Tax Credit? \_\_\_\_\_ if Yes, Indicate whom \_\_\_\_\_

If you have paid any rental expense and/or paid property taxes on your principal residence, Please share with us details and we will claim **ONBEN** for you.

## Other important matters (otherwise indicate we will assume the default response)

### Yours Details

Do you own/hold foreign property with a total cost of more than CAN \$100,000? Yes No

Are you a Canadian Citizen? Yes No

Do you authorize CRA to provide information about you to Elections Canada? 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?

Yes (Attach a void cheque) Direct deposit requested last year No

Please Provide the following scan documents with this checklist.

I have attached "Last year Notice of Assessment"

I have attached "Last Year Tax Return"

I have uploaded all data on CCH iFirm Potral "All Tax Slips"

ON-BEN Claim Rent Paid \$ Property tax paid \$

### Yours O Details

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Are you a Canadian Citizen? Yes No

Do you authorize CRA to provide information about you to Elections Canada? 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?

☐ Yes (Attach a void cheque) ☐ Direct deposit requested last year No

Please Provide the following scan documents with this checklist.

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ON-BEN Claim Rent Paid \$ Property tax paid \$

## Source of Income

(Check if you have any of the following sources of Income and include RECEIPTS in all cases.)

### INCOME

		You	Your Spouse
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		
Workers' Compensation benefits	T5007		
Social assistance payment	T5007		
Self-employed income	Summarize on Page 4		
Rental income	Summarize on Page 5		
Sale of investments	Summarize on Page 6		
Sale of real estate	Summarize on Page 6		
Child support (taxable)	\$ _____		
Tips & gratuities	\$ _____		
Other	\$ _____		

## Deductions and Tax Credits Available

(Check if you have any of the following Deductions and include RECEIPTS in all cases.)

### EXPENSES

	You	Your Spouse
RRSP Contribution		
Union dues & Professional Fees		
Child care expenses		
Moving Expenses (Purpose: _____)		
Interest paid on investment loans		
Investment counseling fees		
Interest paid on student loans		
TFSA contribution (Just for information)		
Tuition Fees – Self T2202		
Tuition fees – Spouse/Children		
Charitable donations		
Political Party Contribution – Federal		
Political Party Contribution – Provincial		
First- time Home Buyer's Amount		
Home Buyers Plan withdrawals/payments		
Lifelong Learning Plan withdrawals/Payments		
Tax instalments paid to CRA		
Other _____ \$ _____		
(Check if you have any of the following deductions and ensure that you have the receipts to support the following items. If unsure, attach receipts.)		
Employment Expense (Summarize on page 3)		
Spousal Support Payment \$ _____		
Child Support Payments (Only if deductible) \$ _____		
Medical Expenses \$ _____		
Other _____ \$ _____		

If you have other income and/or deductions that are not listed above, please itemize below and attach supporting receipts

### Employment Expenses (Only if Approved by your Employer)

Please include a signed T2200- Declaration of Employment Conditions from your employer.

	Your Details	Spouse Details
Travel	\$ _____	\$ _____
Parking	\$ _____	\$ _____
Supplies (stationary, Other)	\$ _____	\$ _____
Telephone	\$ _____	\$ _____
Salaries paid to an assistant	\$ _____	\$ _____
Office Rent	\$ _____	\$ _____
Accounting & Legal ( See * Below)	\$ _____	\$ _____
Advertising & Promotion ( See * Below)	\$ _____	\$ _____
Meals & Entertainment (See * Below)	\$ _____	\$ _____
Rental of Office Equipment ( See * Below)	\$ _____	\$ _____
Training ( See * Below)	\$ _____	\$ _____
Vehicle Expenses	Summarized Below	Summarized below
Home Office Expense	Summarized Below	Summarized below
* Applies to commission employees only	_____	_____
	_____	_____

### Vehicle Expenses (Business Use only )

	Your Details	Spouse Details
Year, Make, & Model	\$ _____	\$ _____
Purchase/Sale Price	\$ _____	\$ _____
Date of Purchase/Sale (See**Below)	\$ _____	\$ _____
Date lease Began/Ended (See**Below)	\$ _____	\$ _____
**If purchased, leased or sold in Year, include relevant agreements.		
Total KMs driven for Business use	_____	_____
Total KMs driven for Personnel use	_____	_____
**CRA might ask for the Car Logs For each business Trip .Please Maintain it		
Expense		
Fuel	\$ _____	\$ _____
Repairs & Maintenance	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Licensing & Registration Fees	\$ _____	\$ _____
Loan Interest	\$ _____	\$ _____
Lease Payments	\$ _____	\$ _____
Car Washes	\$ _____	\$ _____
Parking	\$ _____	\$ _____
Other	\$ _____	\$ _____

## Self-Employed Income & Expenses

### Your Details

Name of Business: \_\_\_\_\_  
Types of Business: \_\_\_\_\_  
Names of partners \_\_\_\_\_ and \_\_\_\_\_  
and % owned: \_\_\_\_\_ % and \_\_\_\_\_ %  
SIN# of Partners: # \_\_\_\_\_

GST Business Number \_\_\_\_\_

Do the above amounts include GST/HST? \_\_\_\_\_

**Are we preparing your GST Return?** \_\_\_\_\_ If yes, attach last return

### Partner/Spouse Details

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ and \_\_\_\_\_  
\_\_\_\_\_ % and \_\_\_\_\_ %  
# \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ If yes, attach last return

Revenue \$ \_\_\_\_\_

**Expenses** \$ \_\_\_\_\_

Meals & Expenses \$ \_\_\_\_\_

Bad Debts \$ \_\_\_\_\_

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

Interest & Bank Charges \$ \_\_\_\_\_

Licenses, dues, memberships & Subscriptions \$ \_\_\_\_\_

Office Expenses \$ \_\_\_\_\_

Supplies \$ \_\_\_\_\_

Legal, Accounting & Other Professional Fees \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Repairs & Maintenance \$ \_\_\_\_\_

Salaries \$ \_\_\_\_\_

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

Telephone \$ \_\_\_\_\_

Vehicle Expenses Summarize Below

Equipment & Furniture Purchases \$ \_\_\_\_\_

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

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

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

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

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

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

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

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

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

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

Summarize Below

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

**Other Expenses if any or details:**

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## Home Office (For Business & Employment)

	Your Details	Spouse Details
% of home used for Business/Employment	_____	_____
Heat	\$ _____	\$ _____
Hydro	\$ _____	\$ _____
Water	\$ _____	\$ _____
Repairs & Maintenance	\$ _____	\$ _____
Insurance (See***Below)	\$ _____	\$ _____
Property Taxes ( See***Below)	\$ _____	\$ _____
Rent	\$ _____	\$ _____
Mortgage Interest (Self-Employed Only)	\$ _____	\$ _____

\*\*\*Applies to commission employees and self-employed ONLY\*\*\*

## Rental Property

Includes the Statement of Adjustments if purchased in Year

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

Province/State: \_\_\_\_\_ Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Names of partners \_\_\_\_\_ and \_\_\_\_\_ % owned: \_\_\_\_\_ and \_\_\_\_\_

SIN# of Partners: # \_\_\_\_\_ and \_\_\_\_\_

	Your Details	Partner/Spouse Details
Rental Income	\$ _____	\$ _____
Expense	\$ _____	\$ _____
Advertising	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____
Office Expense	\$ _____	\$ _____
Legal, Accounting & Other professional Fees	\$ _____	\$ _____
Management & Administration Fees	\$ _____	\$ _____
Repairs & Maintenance	\$ _____	\$ _____
Salaries, Wages & Benefits	\$ _____	\$ _____
Property Taxes	\$ _____	\$ _____
Travel	\$ _____	\$ _____
Utilities	\$ _____	\$ _____
Other:	\$ _____	\$ _____
Major Renovations & Purchases (i.e: Appliances)	\$ _____	\$ _____
	\$ _____	\$ _____

Any other details:

## Sale of Real Estate

Include the Statement of adjustments for BOTH the Sale and Purchase.

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

Province/State: \_\_\_\_\_ Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Names of partners \_\_\_\_\_ and \_\_\_\_\_ % owned: \_\_\_\_\_ and \_\_\_\_\_

SIN# of Partners: # \_\_\_\_\_ and \_\_\_\_\_

### Your Details

Date Purchased (YYYY/MM/DD) \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 Purchase Price \$ \_\_\_\_\_  
 Property Transfer Tax \$ \_\_\_\_\_  
 Legal Cost paid on Purchase \$ \_\_\_\_\_  
 Additions and/or major improvements \$ \_\_\_\_\_  
 Other \_\_\_\_\_ \$ \_\_\_\_\_  
 Other \_\_\_\_\_ \$ \_\_\_\_\_

(YYYY/MM/DD) \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 Date Sold \$ \_\_\_\_\_  
 Sale Price \$ \_\_\_\_\_  
 Legal Cost Paid on Sale \$ \_\_\_\_\_  
 Commission Paid on Sale \$ \_\_\_\_\_  
 Other \$ \_\_\_\_\_  
 Other \$ \_\_\_\_\_

### Partner/Spouse Details

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
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\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
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 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_

## Sale Of Investments (Not including investments held in your RRSP or other registered plans)

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

Dec 31st year end statements

Realized gain/loss report 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	US\$	# Shares Sold	Sale Proceeds \$	Commissions \$	Cost of Shares \$
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____
_____	/ /	/ /	_____	_____	_____	_____	_____

1. What is your contribution limit for the TFSA account? \$

2. Have you contributed more than your TFSA Limit? ☐ Yes ☐ No

**Note:**

1. Please make sure that you don't over-contribute in your TFSA account.
2. Please don't contribute to your TFSA account if you are a non-resident or you have declared your residency status as a non-resident. If you continue contributing to your TFSA account being a non-resident of Canada, you will be charged heavy penalties from the CRA. It is recommended that all non-residents must withdraw all amount from TFSA account and close the TFSA account before filing personal taxes.