

Personal Information <i>Please include an email address for all family members filing tax returns</i>					
Name	SIN	Date of Birth (YYYY / MM / DD)	Home Phone	Cell Phone	Email

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

Did you sell your primary residence?     Yes     No                     
 Year Purchased: \_\_\_\_\_                     
 Date of Sale: \_\_\_\_\_                     
 Proceeds on sale: \_\_\_\_\_

**Marital Status:**     Married     Single     Common Law     Separated     Divorced     Widowed  
 (YYYY / MM / DD)

\*If marital status changed in 2021, please provide date: \_\_\_\_\_

Spouse's net income (if filing elsewhere)                      \$ \_\_\_\_\_

Are you a Canadian Resident?     Yes     No

Are you a USA Resident or Born in USA?     Yes     No

Entry into Canada if you became a tax resident during the year: (YYYY / MM / DD) \_\_\_\_\_

Throughout your life, have you worked in the USA more than 6 quarters (consecutive OR non-consecutive)?                       Yes     No

Did you spend >183 days in the USA in 2021?     Yes     No

Dependents <i>Minor children or family members who rely on you for financial support</i>			
Name	Date of Birth	SIN	Relationship

Direct Deposit Information			
CRA is phasing out providing refunds by way of cheque. Please provide us with a void cheque or your banking information.	Transit #	Institution #	Account #

Did you make an RRSP contribution?	\$ _____
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*Please check any that apply to you and provide supporting documents*

**Income**

**Tax Slips**

- T4 - Employment Income
- T4(A) - Other Employment Benefits, Scholarships
- T4(A) - COVID-19 CRA Emergency or Recovery Benefits
- Other Employment Benefits
- T4A (P) - Canada Pension Plan Benefits
- T4A (OAS) - Old Age Security
- T4RSP - RRSP Income
- T4RIF - RIFF Income
- T4E - Employment Insurance Benefits
- T4E - COVID-19 Service Canada Employment Insurance Benefits
- T5007 - WCB Benefits
- T5018 - Subcontractor Statement Payment

**Other**

- Alimony Received
- Scholarships/Bursaries

**Investment**

- T3, T5 - Interest and Dividend Income
- T5008 - Statement of Security Transactions
- Foreign Income
- Annuities
- Rental Income and Expenses
- T5013 - Partnership Income
- Details of all capital gains/losses including Broker Statements
- Sale of Real Estate
- Crypto Currency (details / investments)

**Business - details of Revenue & Expense**

- Self Employment Income
- Farming/Fishing Income
- Professional Earnings
- Self-Employment Commission Income

**Deductions and Credits**

**Non-Refundable Credits**

- Disability Deductions
- T2202 Tuition Fees/Education Credit for Dependant
- Dependant's Net Income \$ \_\_\_\_\_ (if GGT not preparing)
- Medical Receipts - Less any reimbursements from insurance
- Charitable Donations
- Attendant Care Expenses
- Are you a first time home buyer? Yes    No
- Eligible Educator School Supply Tax Credit (max \$1,000)
- Canada Caregiver - Approved T2201  
or a signed statement from a medical practitioner

**Other Expenses**

- Political Contribution Receipts
- Allowable Business Investment Loss
- Dependant Data (GST Credit & Child Tax Benefit)
- Home Accessibility Tax Credit (max \$10,000 - must be **over 65**)
- T2200 - Declaration of Conditions of Employment

**Work from Home due to COVID-19**

- T2200S - Declaration of Conditions of Employment for Working at Home due to COVID-19
- or Flat Rate Method using # \_\_\_\_\_ days worked at home (if no T2200 or T2200S issued)

**Other Deductions**

- RRSP Deductions
- Union/Professional Dues
- Alimony Paid (Name, SIN, Amount)
- Home Buyers Plan - RRSP
- Lifelong Learning Plan - RRSP
- Interest Paid on Student Loans
- Interest and Carrying Charges on Investments
- Investment Counsel and Accounting Fees
- Education Expenses - not issued on a T2202 (cost < \$250)
- Deductible Legal Fees
- Child Care Expenses (receipts required)
- Moving Expenses (full details required)
- Did you purchase a brand new home in 2021?     Yes     No
- Did you sell your Principal residence?     Yes     No  
If yes, please provide year purchased, date of sale & proceeds

## Foreign Asset Disclosure

**Did you own foreign investment assets either inside or outside of Canada with an aggregate cost base at any time in 2021 that exceeded \$100,000 CDN?**

Please select answer:

Yes

No

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### Examples

- Shares in a foreign corporation (ie. Apple)
- Investments held in off-shore mutual funds
- Outstanding debt owing from a non-resident of Canada
- Bonds from foreign countries
- Ownership of foreign real property (except for personal use)
- Interest in a non-resident trust
- Money or crypto currency in foreign bank accounts

### Please Note

- RRSPs & TFSAs are exempt