

# PERSONAL TAX INFORMATION FORM

## IDENTIFICATION

1. Your Name: \_\_\_\_\_ SIN# \_\_\_\_\_ Date of Birth: \_\_\_\_\_
2. Your Spouse: \_\_\_\_\_ SIN# \_\_\_\_\_ Date of Birth: \_\_\_\_\_
3. Address:  
Street: \_\_\_\_\_ City: \_\_\_\_\_ Postal Code: \_\_\_\_\_
4. Your home phone#: \_\_\_\_\_ Best time to reach: \_\_\_\_\_ Email: \_\_\_\_\_
5. Your work phone#: \_\_\_\_\_ Best time to reach: \_\_\_\_\_ Email: \_\_\_\_\_

6. Your Marital Status:  Married  Widowed  Separated  Common-law  Divorced  Single
7. Are we preparing a tax return for your spouse?  Yes  No
8. If we are NOT PREPARING a return for your spouse, please provide the following:  
Net income figure from line 236 on page 2 of his or her current year tax return: Spouse's net income \$ \_\_\_\_\_

9. List any dependents who were 18 or under as of December 31 of current year
- | Name  | Relationship | Income | Date of Birth |
|-------|--------------|--------|---------------|
| _____ | _____        | _____  | _____         |
| _____ | _____        | _____  | _____         |
| _____ | _____        | _____  | _____         |

10. Did you own/hold foreign property with a cost of more than \$100,000?  Yes (attach details)  No
11. a) Are you a Canadian Citizen?  Yes  No      b) Are you a US Citizen?  Yes  No

## EMMIGRATION

12. Are you emigrating from Canada?  Yes  No If yes, please answer the following questions
- a. Date of Departure \_\_\_\_\_ (mm/dd/yy)
- b. How long do you expect to be away? \_\_\_\_year \_\_\_\_months      Do you have any of the followings:
- RRSP  Home Buyers Plan  House and/or Other Properties  Investments such as stocks, bonds, etc.
- Bank Account  Family Ties in Canada  Asset such as House and/or Other Properties
13. Do you have rental property?  Yes  No
14. If you have rental property, do you want us to prepare your rental statement?  Yes  No

## IMMIGRATION

15. Are you immigrating to Canada?  Yes  No If yes, please answer the following question
- a. Date of Arrival \_\_\_\_\_ (mm/dd/yy)

We will be pleased to prepare your tax return for the year you immigrate. Please provide the following applicable information when received. We will follow up with you to ensure your first year tax return in Canada is complete.

In order for us to prepare your tax return, we have listed below to assist and ensure that you have all necessary information

Your current year Income  
Check if you have the following  
Income items:

<b>Item</b>	<b>Slips to Bring</b>
<input type="checkbox"/> Employment income	T4
<input type="checkbox"/> Taxable disability income	T4A
<input type="checkbox"/> Profit Sharing income	T4PS
<input type="checkbox"/> Commission income	T4 or T4A
<input type="checkbox"/> Old Age Security income	T4(OAS)
<input type="checkbox"/> Canada Pension Plan income	T4AP
<input type="checkbox"/> Other pension/annuity income	T4A
<input type="checkbox"/> RRSP income	T4RSP
<input type="checkbox"/> RRIF income	T4RIF
<input type="checkbox"/> Withdrawals from RRSP	T4RSP
<input type="checkbox"/> EI Benefits	T4E
<input type="checkbox"/> Worker's Compensation (WSIB)	T5007
<input type="checkbox"/> Social Assistance payments	T5007
<input type="checkbox"/> Dividend income	T3s and T5s
<input type="checkbox"/> Interest income	T5s
<input type="checkbox"/> Limited partnership income	T5013
<input type="checkbox"/> Rental property income	see next page
<input type="checkbox"/> Sale of real estate	see next page
<input type="checkbox"/> Sale of non-RRSP stocks	see next page
<input type="checkbox"/> Sale of non-RRSP mutual funds	see next page
<input type="checkbox"/> Self-employed income	see back page
<input type="checkbox"/> Alimony income	\$ _____
<input type="checkbox"/> Other income:	
_____	\$ _____
_____	\$ _____

Your current year Deductions/Credits  
Check if you have the following:  
Please include receipts.\*\*\*

<b>Item</b>	<b>Amount</b>
<input type="checkbox"/> Charitable donations	\$ _____
<input type="checkbox"/> Political party contributions	\$ _____
<input type="checkbox"/> Labour-sponsored funds contributions	\$ _____
<input type="checkbox"/> RRSP contributions	\$ _____
<input type="checkbox"/> Tuition fees for yourself	\$ _____
<input type="checkbox"/> Children's/spouse's tuition fees	\$ _____

\_\_\_\_\_

Please note amount and ensure that you have receipts to support the following items: (If unsure, attach receipts.)

<input type="checkbox"/> Employment expenses	see back page
<input type="checkbox"/> Alimony payments made	\$ _____
<input type="checkbox"/> Disability amount	\$ _____
<input type="checkbox"/> Medical expenses	\$ _____
<input type="checkbox"/> Rent Paid	\$ _____
<input type="checkbox"/> Safety deposit box charges	\$ _____
<input type="checkbox"/> Investment loan interest	\$ _____
_____	\$ _____
(Bank/Trust Company)	
<input type="checkbox"/> Tax installments paid to the government	\$ _____
<input type="checkbox"/> Union dues, professional fees	\$ _____
<input type="checkbox"/> Child care expenses	\$ _____
<input type="checkbox"/> Other _____	\$ _____

*** If there is a discrepancy between the figures above and the receipts provided, we will use the total of the receipts provided.
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## Self-Employed Income & Expenses

Name of Business \_\_\_\_\_

Type of Business \_\_\_\_\_

Joint Owner and % \_\_\_\_\_

**Income** \$ \_\_\_\_\_

### Expenses

Cost of sales (purchases) \$ \_\_\_\_\_

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

Meals/entertainment \$ \_\_\_\_\_

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

Interest/bank charges \$ \_\_\_\_\_

Licenses, dues, fees, business tax \$ \_\_\_\_\_

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

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

Legal & accounting fees \$ \_\_\_\_\_

Management and Admin fees \$ \_\_\_\_\_

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

Maintenance and repairs \$ \_\_\_\_\_

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

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

Travel (incl. accommodations) \$ \_\_\_\_\_

Telephone and Utilities \$ \_\_\_\_\_

Delivery, freight, and express \$ \_\_\_\_\_

Convention fess \$ \_\_\_\_\_

Other expenses \$ \_\_\_\_\_

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

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

Equipment/furniture purchases (if you need more space, attach list)

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

Registered for HST?  YES  NO

If yes, do the above figures include HST?

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Automobile SEE ACROSS

Home Office SEE BELOW

## Home Office Expense

Business or Employment Use % \_\_\_\_\_  
(percentage of house used for business or employment)

**Expenses** **Total for current year**

Heat \$ \_\_\_\_\_

Hydro \$ \_\_\_\_\_

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

Maintenance, repairs \$ \_\_\_\_\_

Mortgage Interest/Rent paid \$ \_\_\_\_\_

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

Water \$ \_\_\_\_\_

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

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

## Employment Expenses

Please ensure that you have a signed **T2200** Declaration of Employment Conditions from your employer available should you be asked by the government to substantiate this claim.

### Expenses

Accounting, legal fees \$ \_\_\_\_\_

Advertising, promotion \$ \_\_\_\_\_

Meals/entertainment \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_

Parking \$ \_\_\_\_\_

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

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

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

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

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

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

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

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

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

Is your employer registered for HST?  YES  NO

Automobile SEE BELOW

Home Office SEE BELOW

## Automobile Expenses

**Year/make of Car:** \_\_\_\_\_

Year Purchased \_\_\_\_\_

Purchase Price/FMV of leased vehicle on lease date  
\$ \_\_\_\_\_

Total Km driven in current year \_\_\_\_\_

Business or Employment Use % \_\_\_\_\_

### Expenses

Fuel \$ \_\_\_\_\_

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

License & registration \$ \_\_\_\_\_

Maintenance & repairs \$ \_\_\_\_\_

Parking \$ \_\_\_\_\_

### Loan Interest Expense

Date interest payments commenced \_\_\_\_\_

Date interest payments terminates \_\_\_\_\_

Loan Interest \$ \_\_\_\_\_

### Lease Payment

Date lease commenced \_\_\_\_\_

Date lease terminates \_\_\_\_\_

Lease payments \$ \_\_\_\_\_

CAA membership \$ \_\_\_\_\_

Any per km flat allowance received \$ \_\_\_\_\_

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

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

<p><b>Rental Property Income &amp; Expenses</b></p> <p>Address _____</p> <p>Joint owner _____</p> <p>Jt. Ownership % _____</p> <p>Income (rent collected)                 \$ _____</p> <p><b>Expenses</b></p> <p>Advertising                                 \$ _____</p> <p>Insurance                                     \$ _____</p> <p>Mortgage Interest _____</p> <p>Office expenses _____</p> <p>Legal &amp; accounting fees                 \$ _____</p> <p>Management and Administration fee   \$ _____</p> <p>Maintenance &amp; Repairs                 \$ _____</p> <p>Salaries                                     \$ _____</p> <p>Property Taxes                             \$ _____</p> <p>Travel                                        \$ _____</p> <p>Utilities                                     \$ _____</p> <p>Other Expenses _____</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>Major renovations &amp; purchases (ie. Appliances)</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p><i>If the property was purchased in the year, please provide the details.</i></p>	<p><b>Sale of Real Estate</b> (excluding personal residence)</p> <p>Address _____</p> <p>_____</p> <p>Date Sold _____</p> <p>Joint Owner _____</p> <p>Jt. Ownership % _____</p> <p>Date purchased _____</p> <p>_____</p> <p>Purchase price                                 \$ _____</p> <p>Legal costs on purchase                     \$ _____</p> <p>Additions/major improvements:</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>Sale Price                                     \$ _____</p> <p>Legal costs on sale                         \$ _____</p> <p>Commissions paid on sale                 \$ _____</p> <p>Other selling expenses                     \$ _____</p>
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<b>Sale of Non-RRSP Stock</b> (please provide broker's receipts for both the purchase and the sale)					
Name of Stock	Date Sold (dd/mm/yy)	Number of Shares	Sale* Price	Purchase* Price	Commissions Paid
*Price per share					

<p><b>Sale of Transfer of Non-RRSP Mutual Funds</b> (including systematic withdrawal programs)</p> <p>Please provide the current year end statements for all of your non-RRSP mutual funds. Those statements were sent to you by the mutual fund companies in January. The statements show all transactions for Current year, including any sale, redemption or transfer of your shares in the mutual fund during the year.</p> <p>List all of your mutual funds that had shares sold or transferred during the current year.</p> <p>_____</p> <p>_____</p> <p>_____</p>
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