

MEDICAL INFORMATION

Are any of the individuals listed impacted by any medical conditions? **Yes** **No**

If yes, please provide a short description:

Does the individual have a valid Disability Tax Credit with CRA? **Yes** **No**

If no, are they able to obtain a Doctor’s note for their medical condition? **Yes** **No**

Do any medical expenses relate to fertility treatments? **Yes** **No**

ADDITIONAL INFORMATION

Do you earn/collect:

Employment Income	Pension Income	Employment Insurance Income
Investment Income	(if yes who is your financial advisor)	
Other (please specify)		

Did you buy or sell any real estate this year? **Yes** **No**

If yes, please provide the following details:

Purchase Address:	Sale Address:
Purchase Price:	Purchase Price:
	Sale Price: Year Purchased:

Are you a First Time Home Buyer?	Yes	No
Did you move for a new job?	Yes	No
Did you move provinces during the year?	Yes	No

Do you hold foreign investments worth over \$ 100,000 or hold shares in foreign company totaling 10% or more of the company’s ownership?

If yes, please describe the nature of these investments and their market value:

INFORMATION CHECKLIST

If you know, please indicate which of the following are relevant to your return(s):

T3	T4	T4A	T5	T4E	T2202	Donations
Property Taxes		Rent Receipts		Day-care Expenses		Medical Expenses
RSP Contributions		Gains/Losses on Sale of Investments				Short/Long-Term Rental
Income	Self-Employment Income/Expenses			First Home Savings Account Contributions		

If you are self-employed or have rental properties, please fill out the additional page for rental / business activities.

Final Copy of Tax Return PDF or Paper

Rental Property	Self Employed
<p>If you have a new rental property, <u>please provide the purchase documents</u> for us to determine the cost base.</p> <p>If <u>data can be summarized</u> it will be much easier to process your return.</p> <p>For multiple properties, <u>please summarize each property's data separately.</u></p>	<p>Are you registered for HST? Yes No</p> <p>If yes, <u>what is your business number?</u></p> <p>And, <u>do you require our assistance with filings?</u> Yes No</p> <p>If yes, <u>what is your filing frequency?</u> Monthly Quarterly Annually</p> <p>Do you use bookkeeping software? Yes No</p> <p>If no, <u>are your records summarized?</u> Yes No</p>
<p><u>Is your property used for short-term or long-term rental?</u></p> <p style="text-align: center;">Short-Term Long-Term</p> <p><u>If short-term, does it comply with all applicable by-laws?</u></p> <p style="text-align: center;">Yes No</p>	<p><u>If you use a vehicle for your business, please provide the following:</u></p> <p style="text-align: center;">Business Use KM Total KM driven</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Business Use Percentage %</p> <p><u>Common Expenses:</u> Fuel, repairs & maintenance, insurance, parking, etc</p> <p><u>Please provide a travel log of business activities:</u> – date, start and destination with odometer readings, reason for trips.</p> <p><u>Please provide lease documents if leasing.</u></p> <p><u>Please provide purchase/sale documents for new/sold/traded-in vehicles.</u></p>
<p><u>If your rental property is also used personally, please provide one of the following:</u></p> <p style="text-align: center;">Personal Sq Ft: Total Sq Ft:</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Personal Use Percentage %</p>	<p><u>If you used space within your home for business use, please provide one of the following:</u></p> <p style="text-align: center;">Business Use Sq Ft: Total Sq Ft:</p> <p style="text-align: center;">OR</p> <p style="text-align: center;">Business Use Percentage %</p> <p><u>Common Expenses:</u> Utilities – Gas/Propane, Hydro, water heater, etc, Insurance, Annual Mortgage Statement – for interest, Property taxes or rent, repairs and maintenance, condo fees, etc.</p>
<p><u>Common Rental Expenses to Provide:</u></p> <ul style="list-style-type: none"> ○ Insurance ○ Annual Mortgage Statement – for interest (and property taxes) ○ Property management fees ○ Maintenance and repairs ○ Major renovations – please provide receipts ○ Property tax statement ○ Utilities – Gas/Propane, Hydro, water heater, etc ○ Phone bill – include percentage of use for rental ○ Travel mileage – for property visits, supply runs, etc ○ Professional fees ○ Office supplies 	<p><u>Common Business Expenses to Provide:</u></p> <ul style="list-style-type: none"> ○ New asset purchases – please provide receipts ○ Cell phone/internet – include business-use percentage ○ Supplies ○ Professional Fees ○ Bank charges ○ Meals & entertainment ○ Rent
<p><u>Other Rental or Self Employed Comments:</u></p>	