

1. Personal Information

		Taxpayer	Spouse
Name:			
Social Insurance Number:			
Date of Birth: (DD/MM/YY)			
Address:			
Phone:	Home/Cell:		
	Work:		
Email Address:			

Marital Status: ☐ Married ☐ Single ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed

If married or common-law, are we also preparing your spouse's return? ☐ Yes ☐ No

If not, please advise your spouse's net income and provide copy of their T1 return: _____

If your marital status changed during the year, provide date of change (DD/MM/YYYY): _____

2. Dependants

Please add sheet if required

Name	#1	#2	#3	#4
Relationship:				
Date of Birth: (DD/MM/YY)				
Social Insurance Number				
Eligibility for Disability Credit?				
Income				
Attending post-secondary studies?				

3. Residence

Province or territory of residence on December 31 _____

Did you or your spouse immigrate to Canada or emigrate from Canada during the year? ☐ Yes ☐ No

Did you or your spouse move within Canada during the year? ☐ Yes ☐ No

Did you sell your principal residence or a vacation home during the year? ☐ Yes ☐ No

Please provide copies of the original purchase documents and the selling documents.

4. Elections Canada and CRA online mail

Is the taxpayer a Canadian citizen? ☐ Yes ☐ No
Is the spouse a Canadian citizen? ☐ Yes ☐ No
Is the taxpayer a US citizen? If yes, SSN/ ITIN # _____ ☐ Yes ☐ No
Is the spouse a US citizen? If yes, SSN/ ITIN # _____ ☐ Yes ☐ No
If Canadian citizen, the taxpayer authorizes the CRA to provide his/her name, address and date of birth to Elections Canada to update his/her information on the National Register of Electors. ☐ Yes ☐ No

To register for online mail from CRA please provide the email address to give _____

Please note:

By providing an email address, the taxpayer is registering for the online mail service and is authorizing the CRA to send e-mail notifications when the taxpayer has mail to view on My Account. Any notices and correspondence delivered online on My Account will be presumed to have been sent on the date of that email notification. The taxpayer understands and agrees the notice of assessment and notice of reassessment, and any future correspondence eligible for online delivery, will no longer be printed and mailed.

5. Foreign Reporting

Did the taxpayer own or hold foreign property with a total cost of more than CDN\$100,000 at any time during the year? If yes, please review attached T1135 Info sheet. ☐ Yes ☐ No

6. General Income/Deductions

T4 slips – Employment income? ☐ Yes ☐ No
T4A – Commission and self-employment? ☐ Yes ☐ No
T4E – Employment insurance? ☐ Yes ☐ No
T5007 – Social assistance? ☐ Yes ☐ No
Employment income or taxable benefits not shown on the T4 slip? (i.e. tips) _____
Amount and organization of union/professional dues? _____
Child care expenses? If yes, provide slips for each child. ☐ Yes ☐ No
Can you claim eligible moving expenses? If so, please provide details. ☐ Yes ☐ No
List of support payments made or received? Child and spousal support. ☐ Yes ☐ No
Can you claim employment expenses? If so, complete attached employment expense schedule. ☐ Yes ☐ No
If claiming home office, travel or other work expenses is a signed form T2200 attached (conditions of employment)? ☐ Yes ☐ No

7. RRSP & Pension Income

T4A/ T4A (RCA) – Pension, retirement and annuity income? RCA's? Foreign pensions? ☐ Yes ☐ No
T4A(P) – Canada pension plan benefits? US Social security SSA 1099? ☐ Yes ☐ No
T4A (OAS) – Old age security pension slip? ☐ Yes ☐ No
T4RSP/T4 RRIF – Registered retirement savings plan income? RRIF? ☐ Yes ☐ No
Does the taxpayer elect to split eligible pension income with his/her spouse? ☐ Yes ☐ No
RRSP Contribution? If yes, provide slips. ☐ Yes ☐ No
Provide details of Home Buyers Plan or Life Long Learning Plan repayments? ☐ Yes ☐ No

8. Investment Income/Deductions

T3 – Income from trust allocations? ☐ Yes ☐ No

T5 – Investment income? ☐ Yes ☐ No

T4PS – Income from profit sharing plans? ☐ Yes ☐ No

T5013/T5013 (A) – Partnership income? ☐ Yes ☐ No

Did the taxpayer dispose of Cryptocurrency? (include original cost & proceeds) ☐ Yes ☐ No

T5008 – Income from securities transactions? (include original cost basis and date of purchase if not on T5008) and/or provide a gain/loss report from financial institution or wealth manager. ☐ Yes ☐ No

Did the taxpayer dispose of property (include principle residence) during the year? If so, provide the following details:

Description of Property	Date Acquired	Date Disposed	Sales Proceeds	Cost	Expenses for Disposal

If your principal residence has been disposed or deemed disposed of, was it designated as your principal residence for all years or ownership? ☐ Yes ☐ No

If not, please provide the years it was designated as your principal residence _____

Interest paid to earn investment income _____

Investment counsel fees to earn investment income _____

Accounting / legal fees (if deductible) _____

9. Rental Income

If the taxpayer owned a rental property, is the attached rental income statement completed? ☐ Yes ☐ No

10. Self-Employment / Business Income

If the taxpayer operates a business, is a attached Business Professional statement completed? ☐ Yes ☐ No

Are we preparing your HST Return? ☐ Yes ☐ No

If the taxpayer used a vehicle for business, is the automobile expense statement completed? ☐ Yes ☐ No

If the taxpayer used a portion of his home for business, is the home office statement completed? ☐ Yes ☐ No

11. Other Credits

T2202 – Tuition/education amount for the taxpayer or dependant? ☐ Yes ☐ No

Receipt or amount for the taxpayer's student loan interest? ☐ Yes ☐ No

Receipts/Listing of all medical expenses paid in the year for the taxpayer, spouse, and dependants? ☐ Yes ☐ No

Receipts for donations, cash or in kind? ☐ Yes ☐ No

Receipts for political contributions? ☐ Yes ☐ No

Statement for new home to claim the home buyer's amount? ☐ Yes ☐ No

Are you, your spouse or one of your dependants eligible for the disability credit? ☐ Yes ☐ No

Are you eligible for the home accessibility expenses (over age 65 or eligible for disability credit) ☐ Yes ☐ No

Property taxes or rent paid in Ontario? _____

12. COVID-19 related Federal Support Programs

Key COVID-19 related Federal personal support programs:

	Taxable?	\$ Amount Rec'd
Employment Insurance (EI) program	Yes	
Canada Recovery Benefit (CRB)	Yes	
Canada Recovery Sickness Benefit (CRSB)	Yes	
Canada Recovery Caregiving Benefit (CRCB)	Yes	
Canada Emergency Student Benefit (CESB)	Yes	

Key COVID-19 related Federal government support for business, rental or other income:

	Taxable?	\$ Amount Rec'd
Canada Emergency Wage Subsidy (CEWS)	Yes	
Canada Emergency Rent Subsidy (CERS)	Yes	
Canada Emergency Business Account (CEBA)	Yes*	
Canada Recovery Hiring Program (CRHP)	Yes	

* The forgivable portion of the interest-free loan under the CEBA is taxable. Please provide the details.