



Thank you for entrusting us with the preparation of the 2023 personal income tax returns for yourself and/or your family members.

Please fill out the form below and return it to our office along with your tax information and documents. Documents can be sent through email, fax or in person. You are responsible to ensure that the information stated on this form is factually correct as we will use this to file your tax returns.

#### A. Authorization

I provide my authorization for you to discuss my tax return with my (select all that apply):

☐

Spouse/Partner

☐

Parent

☐

Child

☐

Financial Advisor

☐

No one

#### B. Personal information

		ACCOUNTANT	
NAME		SIN #	
STREET ADDRESS	CITY	PROVINCE	POSTAL CODE
DATE OF BIRTH (MM/DD/YYYY)	MARITAL STATUS	CITIZENSHIP	
EMAIL ADDRESS	PRIMARY PHONE #	SECONDARY PHONE #	

#### C. Spouse Information

☐

Same as last year

NAME		SIN #	
STREET ADDRESS	CITY	PROVINCE	POSTAL CODE
DATE OF BIRTH (MM/DD/YYYY)	MARITAL STATUS	CITIZENSHIP	
EMAIL ADDRESS	PRIMARY PHONE #	SECONDARY PHONE #	

**D. Dependents (if applicable)**☐ Same as last year

RELATIONSHIP – DEPENDENT #1	SIN#	INCOME	
NAME	DATE OF BIRTH	CITIZENSHIP	
STREET ADDRESS	CITY	PROVINCE	POSTAL CODE

RELATIONSHIP – DEPENDENT #2	SIN#	INCOME	
NAME	DATE OF BIRTH	CITIZENSHIP	
STREET ADDRESS	CITY	PROVINCE	POSTAL CODE

RELATIONSHIP – DEPENDENT #3	SIN#	INCOME	
NAME	DATE OF BIRTH	CITIZENSHIP	
STREET ADDRESS	CITY	PROVINCE	POSTAL CODE

RELATIONSHIP – DEPENDENT #4	SIN#	INCOME	
NAME	DATE OF BIRTH	CITIZENSHIP	
STREET ADDRESS	CITY	PROVINCE	POSTAL CODE

Please, provide us with the following documents when applicable:

#### E. Income slips

T4 – Employment Income
T4E – Employment Insurance Benefits
T3, T5 – Interest, Dividends, Mutual Funds
T2202, TL11 – Tuition and Education
RC62 – Universal Child Care Benefits
T4A-OAS, T4AP – Old Age Security and CPP Benefits
T4A – Other Pensions and Annuities
T5007 – Social Assistance Payments
T2201 – Disability Credit Form

Other information (please specify)

#### F. Documentation

Stock option/benefit plan statements from employer
Annual mutual fund statements for all funds held outside your RRSP or RRIF
Details of all non-RRSP and non-RIF investment disposals during 2023, including information to support original purchase price (cost base)
Details of investments that were subject to 1994 capital gains election, if any
<p>Do you hold investments or investment real estate property outside Canada which original cost exceeds \$100,000 CDN?</p> <p><input type="checkbox"/> Yes – please provide details</p> <p><input type="checkbox"/> No</p>
<p>Do you and your family members own 10% or more of the total equity of a non-resident corporation?</p> <p><input type="checkbox"/> Yes – please provide details on a separate sheet</p> <p><input type="checkbox"/> No</p>

<p>Did you have any transactions with a Non-Resident Trust?</p> <p><input type="checkbox"/> Yes – please provide details on a separate sheet</p> <p><input type="checkbox"/> No</p>
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### G. Rental Income

*(Includes income generated from short-term rentals such as Airbnb)*

Full address including postal code, number of units
Revenue and expenses, including mortgage interest (not principal)
Percentage of personal use, if applicable
If bought or sold in 2023, provide purchase/sale agreement, statement of adjustments, reporting letter from lawyer and allocation of value between land and building

### H. Self-Employment Income

Revenue for the year (on an accrual basis)
HST return(s), if applicable, for the year
T2200 – Conditions of Employment Form Signed by Employer

Home-Office Expenses	Net	HST	Total
Heat			
Electricity			
Insurance			
Maintenance			
Mortgage Interest			
Property Taxes			
Area of home used for business (sq. ft.)			
Total area of home (sq. ft)			

<b>Auto Expenses</b>	<b>Net</b>	<b>HST</b>	<b>Total</b>
Fuel			
Maintenance and Repairs			
Insurance			
License and Registration			
Capital Cost Allowance			
Interest			
Leasing			
Parking Charges			
Others			
Total KMs driven during 2023			
Total KMs driven for business purposes			

<b>General Office Expenses</b>	<b>Net</b>	<b>HST</b>	<b>Total</b>
Meals and entertainment			
Travel			
Promotion			
Conferences			
Telecommunications			
Supplies			
Others			

### **I. Deductions**

	RRSP contribution receipts
	Childcare, with supporting receipts and SIN of caregiver
	Adoption costs
	Union/membership dues
	Moving expenses (contact us for detailed list)
	Alimony/support payments, with copy of agreement if not previously provided
	Legal fees to collect salary, alimony, support
	Investment management fees
	Investment/business interest expense

	Tax shelter deductions – tax slips and tax reporting package
	Trades people's tools

**J. Tax Credits**

	Charitable and political donation receipts
	Indicate if eligible for first-time donor's super credit
	Medical/dental/attendant care expenses with receipts
	Student loan interest statement
	2023 rent/property tax information if eligible for Ontario tax credits
	First-time home buyers credit for 2023
	Receipts of short-term accommodations in Ontario for 2023 (Ontario Staycation Tax Credit)
	Home Renovations for seniors or persons living with a disability to improve accessibility

**K. Miscellaneous**

	2022 Notice of assessment/reassessment
	2023 tax installment summary
	If new personal tax client, copy of 2022 return, carry-forward details such as donations, losses, RRSP contributions, etc.