

Name(s):		
Phone Number(s):		
Email Address(s):		
Important changes we should know about? (marital status, children, home purchase/sale, etc.)		

INCOME SLIPS:

- T4 Slips (T4, T4E, T4A, T4A (CPP), T4A(OAS), T4PS)
 T4RSP, T4RIF
 T5007

INVESTMENT INFORMATION:

- T3, T5, T5008, T5013
 List of other income or investments sold
 Deductible interest paid
 List of foreign investment or property owned

OTHER INCOME INFORMATION:

- Alimony or separation allowances received
 Child support (___by court order prior to May 1, 1997)
 Foreign income
 Other:

RENTAL &/OR FARM INCOME:

- | | |
|--|--|
| <input type="radio"/> Income/revenue sources | <input type="radio"/> Expenses (advertising, insurance, utilities, maint. & repairs, etc.) |
| <input type="radio"/> Mortgage interest | <input type="radio"/> Additions (new roof, furniture, etc) |
| <input type="radio"/> Property taxes | <input type="radio"/> Equipment purchases or sales |
| <input type="radio"/> Percentage of expenses to be applied to farm operation (changes from previous year?) | <input type="radio"/> FMV for harvested crops, livestock and feed inventories at year end |
| <input type="radio"/> Cost of inventory if purchased (not raised or grown) | <input type="radio"/> House expenses (farm only) |

BUSINESS AND PROFESSIONAL INCOME:

- | | |
|---|---|
| <input type="radio"/> Summary of income and expenses | <input type="radio"/> Capital assets purchased and sold in the year |
| <input type="radio"/> Home office expenses | <input type="radio"/> HST installments |
| <input type="radio"/> Automobile expenses (total annual KMs driven & the total annual KMs for business) | <input type="radio"/> Accounts receivable, accounts payable and inventory balance at year end |

DEDUCTIONS / TAX CREDITS:

- | | |
|---|---|
| <input type="radio"/> RRSP contributions slips, Home Buyer's Plan or Lifelong Learning Plan withdrawals or repayments | <input type="radio"/> Home reno costs (seniors/DTC only) or transit passes (seniors only) |
| <input type="radio"/> Moving expense receipts & details | <input type="radio"/> Interest on student loans |
| <input type="radio"/> Child care expense receipts | <input type="radio"/> Education and tuition receipts |
| <input type="radio"/> Professional or union dues receipts | <input type="radio"/> Rent or property tax paid |
| <input type="radio"/> T2200 (Employment Expenses) | <input type="radio"/> Medical expense receipts |
| <input type="radio"/> TL2 Form (Lodging & meals for transportation employees) | <input type="radio"/> Charitable and political donation slips |
| <input type="radio"/> Tax installments paid | <input type="radio"/> Other: |

SPECIAL INSTRUCTIONS:
