

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

**INCOME SLIPS:**

- |   |                                    |                             |
|---|------------------------------------|-----------------------------|
| <input type="radio"/> T4 Slips (T4, T4E, T4A, T4A (CPP), T4A(OAS), T4PS | <input type="radio"/> T4RSP, T4RIF | <input type="radio"/> T5007 |
| <input type="radio"/> COVID-19 related benefits and income              |                                    |                             |

**INVESTMENT INFORMATION:**

- |  |  |
|--|--|
| <input type="radio"/> T3, T5, T5008, T5013     | <input type="radio"/> List of other income or investments sold     |
| <input type="radio"/> Deductible interest paid | <input type="radio"/> List of foreign investment or property owned |

**OTHER INCOME INFORMATION:**

- |   |   |
|---|---|
| <input type="radio"/> Spousal support received/paid | <input type="radio"/> Child support received/paid |
| <input type="radio"/> Foreign income                | <input type="radio"/> 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"/> Home office 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"/> Carrying charges and interest           |
| <input type="radio"/> Moving expense receipts & details   | <input type="radio"/> Interest on student loans               |
| <input type="radio"/> Childcare 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"/> Employment expenses and T2200 form  | <input type="radio"/> Medical expense receipts                |
| <input type="radio"/> 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:**


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