

<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:

- T4 Slips (T4, T4E, T4A, T4A (CPP), T4A(OAS), T4PS)     
  T4RSP, T4RIF     
  T5007  
 COVID-19 related benefits and income

### 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:

### BUSINESS, PROFESSIONAL, RENTAL &/OR FARM INCOME:

- Income/revenue sources     
  Expenses (advertising, insurance, utilities, maint. & repairs, etc.)  
 Mortgage interest     
  Additions (new roof, furniture, etc)  
 Property taxes     
  Capital assets purchased and sold in the year  
 Cost of inventory if purchased (not raised or grown)     
  Home office expenses  
 HST installments     
  Automobile expenses (total annual KMs driven & the total annual KMs for business)

### DEDUCTIONS / TAX CREDITS:

- RRSP contributions slips, Home Buyer's Plan or Lifelong Learning Plan withdrawals or repayments     
  Carrying charges and interest  
 Moving expense receipts & details     
  Interest on student loans  
 Childcare expense receipts     
  Education and tuition receipts, including the Canada Training Credit  
 Professional or union dues receipts     
  Rent or property tax paid  
 T2200 (Employment Expenses) or COVID Work from Home     
  Medical expense receipts (prescription summary from pharmacy) including travel expenses  
 TL2 Form (Lodging & meals for transportation employees)     
  Charitable and political donation slips  
 Tax installments paid     
  Other:

### SPECIAL INSTRUCTIONS:

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