

IDENTIFICATION AND CONTACT INFORMATION (Taxpayer 1)

Full Name	SIN	Phone
Birthdate MM/DD/YY	Citizenship	Email

SPOUSE INFORMATION (Taxpayer 2)

Full Name	SIN	Phone
Birthdate MM/DD/YY	Citizenship	Email

DEPENDENT(S)

Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody
Full Name	Birthdate MM/DD/YY	SIN	Citizenship	Custody

IF ANY CHANGES

Current Address		
Marital Status (as of Dec. 31/21)	Date of Change in Marital Status	

INVESTMENT ADVISOR

Name	Email	Phone
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Preferred delivery method of COMPLETED tax return: Portal Email Mail/Courier

Please review the list of income and deductions/credits below, and check off those items that apply to you and your spouse.

Taxpayer 1 Taxpayer 2

Taxpayer 1 Taxpayer 2

Income

<input type="checkbox"/>	<input type="checkbox"/>	Employment Income (T4 or T4A Slips)	<input type="checkbox"/>	<input type="checkbox"/>	Rental Income and Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Pension Income (T4A, T4OAS, T4AP Slips)	<input type="checkbox"/>	<input type="checkbox"/>	Capital Gains (Please indicate the cost and proceeds of any asset disposals)
<input type="checkbox"/>	<input type="checkbox"/>	Employment Insurance Benefits (T4E Slips)	<input type="checkbox"/>	<input type="checkbox"/>	Self-Employment Income and Expenses
<input type="checkbox"/>	<input type="checkbox"/>	Investment Income - Interest Dividends (T5 Slips)	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Income (RRSP, RRIF, Annuity)
<input type="checkbox"/>	<input type="checkbox"/>	Estate/Trust/Mutual Fund Income (T3 Slips)	<input type="checkbox"/>	<input type="checkbox"/>	Other Income, Support Received, Death Benefits, etc
<input type="checkbox"/>	<input type="checkbox"/>	Partnership Income (T5013)	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	COVID-19 benefits (T4A/T4E slips for CRB, CRCB, CRSB, CWLB)			

Deductions and Credits

<input type="checkbox"/>	<input type="checkbox"/>	RRSP Contributions	<input type="checkbox"/>	<input type="checkbox"/>	Amount of Property Tax/Rent Paid in Year (include Landlord's Name and Address of Property)
<input type="checkbox"/>	<input type="checkbox"/>	Tuition Receipts (T2202 Form)	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Donations and Political Contributions
<input type="checkbox"/>	<input type="checkbox"/>	Union, Professional Dues Receipts	<input type="checkbox"/>	<input type="checkbox"/>	Student Loan Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>	Child Care Expenses (SIN, Name and Address of Caregiver)	<input type="checkbox"/>	<input type="checkbox"/>	Eligible Support Payments
<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses	<input type="checkbox"/>	<input type="checkbox"/>	Other Deductions (Carrying Charges, Interest)
<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses (2022 Summary from Pharmacy)	<input type="checkbox"/>	<input type="checkbox"/>	Renovations for Seniors 65+
<input type="checkbox"/>	<input type="checkbox"/>	T2200/T2200S/TL12 Forms (Employment Expenses - Include Statement of Exp.)	<input type="checkbox"/>	<input type="checkbox"/>	Worked in Construction
<input type="checkbox"/>	<input type="checkbox"/>	T2201 Slips (Disability Deductions, Self/Dependents)	<input type="checkbox"/>	<input type="checkbox"/>	Accommodation Expenses in Ontario (hotel/airbnb)
<input type="checkbox"/>	<input type="checkbox"/>	Home Office Expenses (Complete Checklist)	<input type="checkbox"/>	<input type="checkbox"/>	Digital News Subscription Costs

Other

<input type="checkbox"/>	<input type="checkbox"/>	Copy of 2021 Notice of (Re)Assessment	<input type="checkbox"/>	<input type="checkbox"/>	Do you authorize CRA to provide info. about you to Elections Canada? (Check for Yes)
<input type="checkbox"/>	<input type="checkbox"/>	Income Tax Installments, Final Statement Indicating 2022 Total	<input type="checkbox"/>	<input type="checkbox"/>	List of Foreign Property Owned if Cost > \$100,000 (T1135)
<input type="checkbox"/>	<input type="checkbox"/>	Details of Canada Savings Bonds Purchases/Cashed in and on Hand	<input type="checkbox"/>	<input type="checkbox"/>	Are you a U.S. Green Card Holder? (Check for Yes)
<input type="checkbox"/>	<input type="checkbox"/>	Direct Deposit my Refund (Enclose 'Void' Cheque for Account Info)	<input type="checkbox"/>	<input type="checkbox"/>	Did you spend more than 120 days in the U.S. during 2022? (Check for Yes)
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Residence Sold During the Year	<input type="checkbox"/>	<input type="checkbox"/>	Do you want gov't to contact you re: organ donation?
<input type="checkbox"/>	<input type="checkbox"/>	Have you received any private corporation dividends not exempt from TOSI?	<input type="checkbox"/>	<input type="checkbox"/>	Do you own a vacant or underused residential property in Canada? (Complete UHT Checklist)