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INCOME TAX SUMMARY SHEET

Name: _____ **Date of Birth:** _____ **Telephone:**
Partner: _____ **Date of Birth:** _____ **Home:** _____
Address: _____ **Work:** _____
 _____ **E-mail:** _____

Marital Status: _____

Dependants:

_____	Date of Birth: _____	Relationship: _____
_____	Date of Birth: _____	Relationship: _____
_____	Date of Birth: _____	Relationship: _____
_____	Date of Birth: _____	Relationship: _____

Do you agree to give your name to elections Canada?	YES / NO	Please circle one
Do you want to split eligible pension income with your spouse?	YES / NO	Please circle one
Do you own foreign property costing more than \$100,000?	YES / NO	Please circle one
Did you sell any property in the tax year?	YES / NO	Please circle one

eg: Cottages, Land, Stocks, Bonds, Mutual Funds, etc.

Information Slip Checklist for Income:

Employment: T4
 Pension: T4A
 CPP: T4AP
 Old Age Security: T4A(OAS)
 Employment Insurance: T4E
 Dividends: T5
 Interest: T5
 RRSP income: T4RSP
 RIF income: T4RIF
 Estate/Trust/Mutual Funds: T3
 Universal Child Care Benefit: RC62
 Scholarships:
 Alimony Received:
 Other:

Receipts & Forms for Deductions and Credits:

RRSP Contributions
 Union/professional dues
 Deductible Employment Expenses T2200
 Claim for Board & Lodging Expenses TL2
 Child Care Expenses
 (include caregiver name(s) & SIN #(s))
 Childrens' Fitness
 Childrens' Activity
 Moving Expenses & Details
 Safety Deposit Box Rental
 Property Taxes
 Rent Paid
 (include Landlord's Name & Address)
 Tuition Fees T2202
 Interest Paid on Student Loans
 Medical
 Charitable Donations
 Political Donations
 Monthly Transit Passes
 Alimony Paid
 Other

Stocks/Bonds/Mutual Funds: please provide
 brokers statements & sell/buy trade slips

*** PLEASE PROVIDE LAST YEAR'S NOTICE OF ASSESSMENT ***

NEW CLIENTS: PLEASE PROVIDE LAST YEAR'S TAX RETURN

**PLEASE CONTINUE WITH BACK PAGE IF YOU OWN A PROPRIETORSHIP,
 RENT OUT PROPERTY, OR HAVE EMPLOYMENT RELATED EXPENSES**

INCOME TAX SUMMARY SHEET
continued

Please provide the following information along with information on front of this sheet:

- Back up Disk, or Manual Ledgers Providing Business Income & Expenses
- Bank Statements for the Year
- January Bank Statement for the Newest Year
- T4 Summary for Employees Paid
- HST Return(s) for the Year
- Ending Inventory at Cost

USE OF HOME

% Use of Home Used for Business
% Use of Home Used for Rental
% Use of Home Used for Employment
Heat
Hydro
Water
Property Taxes
Insurance
Maintenance
Mortgage Interest
Other _____

USE OF VEHICLE

Please consult your mileage log and report the following summary information

Total vehicle mileage
Total vehicle mileage for business activities
Total vehicle mileage for employment activities

If your account records DO NOT include vehicle expenses, please provide them here

Fuel
Repairs & Maintenance
Insurance
Loan Interest
Lease payments
Licences & Fees
Parking
