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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  
**Do you want to split eligible pension income with your spouse?** YES / NO  
**Do you own foreign property costing more than \$100,000?** YES / NO  
**Did you sell your principle dwelling?** YES / NO  
**Did you sell Cottage, land, or depreciable property?** YES / NO  
**Did you sell Stocks, Bonds, Mutual Funds?** YES / NO

**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  
 Trust/Investment income T3  
 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))  
 Moving Expenses & Details  
 Property Taxes  
 Rent Paid  
 (include Landlord's Name & Address)  
 Tuition Fees (download from institution) 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
