

Income Tax Summary Sheet

General Information

Contact Information

Name: _____ Date of Birth: _____
 Partner: _____ Date of Birth: _____
 Marital Status: _____

Telephone (H): _____
 (C): _____
 Email: _____
 Preferred Method of Contact: _____

Dependants Information

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

Please Circle Yes or No on the following Questions

As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors?	Yes / No
Do you want to split eligible Pension income with your partner?	Yes / No
During the current tax year, did you own more then \$100,000 of foreign property?	Yes / No
Did you sell any property in the tax year? (IE Principal Residence, cottages, land, stocks, bonds, mutual funds, etc)	Yes / No

Please provide the following available information

Information Slips from income

Receipts & Forms for Deductions and Credits

<input type="checkbox"/> Employment	T4	<input type="checkbox"/> RRSP Contributions	
<input type="checkbox"/> Pension	T4A	<input type="checkbox"/> Union/ Professional Dues	
<input type="checkbox"/> CPP	T4AP	<input type="checkbox"/> Declarations of conditions for Employment	T2200
<input type="checkbox"/> Old Age Security	T4A(OAS)	<input type="checkbox"/> Claim for Board & Lodging Expenses	TL2
<input type="checkbox"/> Employment Insurance	T4E	<input type="checkbox"/> Child Care Expenses	(include caregivers name & Sin #)
<input type="checkbox"/> Dividends	T5	<input type="checkbox"/> Moving Expenses & Details	
<input type="checkbox"/> Interest	T5	<input type="checkbox"/> Property Taxes	
<input type="checkbox"/> RRSP Income	T4RSP	<input type="checkbox"/> Rent Paid	(include Landlord Name and Address)
<input type="checkbox"/> RIF Income	T4RIF	<input type="checkbox"/> Tuition Fees	T2202
<input type="checkbox"/> Estate/Trust/Mutual Funds	T3	<input type="checkbox"/> Interest Paid on Student Loans	
<input type="checkbox"/> Scholarships	T5	<input type="checkbox"/> Medical Receipts	
<input type="checkbox"/> Alimony Received		<input type="checkbox"/> Charitable Donation Receipts	
<input type="checkbox"/> Other:		<input type="checkbox"/> Political Donation Receipts	
		<input type="checkbox"/> Monthly Transit Passes	Seniors Only
Stocks/Bonds/Mutual Funds: Please provide brokers statements & sell/buy trade slips		<input type="checkbox"/> Alimony Paid	
		Other	

PLEASE PROVIDE LAST YEAR'S NOTICE OF ASSESSMENT

NEW CLIENTS: PLEASE PROVIDE LAST YEAR'S FULL TAX RETURN

Do you own a proprietorship, rental property or have employment related expenses? Please continue to the reverse side.

If you are an owner of a proprietorship, rent out property or have employment related expenses, please provide the following information OR complete the sections below

- Back up Disk/ Spreadsheet or manual ledgers providing business income & expenses
- Bank statements for the year
- January bank statement of the newest calendar year
- T4 Summary for employees paid
- HST Return(s) for the year
- Ending inventory costs

Business Use of Home		Rental	
% of use of home for Business	%	% use of home for rental	%
% use of home for Employment	%	Heat	\$
Heat	\$	Hydro	\$
Hydro	\$	Water	\$
Water	\$	Property Taxes	\$
Property Taxes	\$	Insurance	\$
Insurance	\$	Maintenance	\$
Maintenance	\$	Mortgage Interest	\$
Mortgage Interest	\$	RENTAL INCOME	\$
Other _____	\$		

Use of Vehicle

Please consult your mileage log and report the following information

Total Vehicle Mileage	KM
Total Vehicle Mileage for Business Activities	KM
Total Vehicle Mileage for Employment Activities	KM
Fuel Expense	\$
Repairs & Maintenance	\$
Loan Interest	\$
Lease Payments	\$
Licences & Fees	\$
Parking	\$
	\$