



# Tax Services Toronto

555 Burnhamthorpe Rd.  
Suite 406  
Toronto, ON M9C 2Y3  
Tel: 416-626-2727  
Fax: 416-621-7136

Your number one place to have your tax returns prepared.

**Please include the following information along with this completed checklist:**

- A copy of your current year tax information slips (T4, T5, T4a, etc.)
- A copy of your last year Notice of Assessment. This is the computer printout you received from Canada Customs and Revenue Agency-CCRA (formerly Revenue Canada) showing the numbers *from your* last tax return with a refund cheque, if applicable.
- We have included worksheets with the checklist to assist you if you sold stocks, mutual funds or real estate in the current year or if you had a rental property, business income or employment expenses in the current year.

**IDENTIFICATION**

1. Your Name: \_\_\_\_\_ SIN# \_\_\_\_\_ Birthdate: \_\_\_\_\_
2. Your Spouse: \_\_\_\_\_ SIN# \_\_\_\_\_ Birthdate: \_\_\_\_\_
3. Address:  
Street: \_\_\_\_\_ City: \_\_\_\_\_ Postal Code: \_\_\_\_\_
4. Your home phone#: \_\_\_\_\_ Best time to reach: \_\_\_\_\_
5. Your work phone#: \_\_\_\_\_ Best time to reach: \_\_\_\_\_

6. Your Financial Planner & Institution: \_\_\_\_\_

7. Your Marital Status:  Married  Widowed  Separated  Common-law  Divorced  Single

8. Are we preparing a tax return for your spouse?  Yes  No

9. If we are NOT PREPARING a return for your spouse, please provide the following:  
Net income figure from line 236 on page 2 of his or her tax return: \_\_\_\_\_ Spouse's net income \$ \_\_\_\_\_

10. List any dependents who were 18 or under as of December 31 of current year

Name	Relationship	Income	Birthdate
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

11. Do you want your return filed Electronically?  Yes (no extra charge)  No (\$5 processing fee)

12. Did you own/hold foreign property with a cost of more than \$100,000?  Yes (attach details)  No

13. Do you authorize CCRA to provide information about you to Elections Canada?  Yes  No

14. Do you want your tax refund deposited directly to your bank account?

Yes (attach void cheque)  Direct deposit requested last year  No

15. How do you want your tax return delivered once it has been completed by our staff?

- Hold for pick-up at Tax Services Toronto
- Mail to my home address via Canada Post. There is a handling/postage charge of \$7.50 for this service.
- Courier to the address above. There is a handling/courier charge of \$15.00 for this service.
- Other \_\_\_\_\_  
(Please indicate)

Your current year Income  
Check if you have the following  
Income items:

Item	Slips to Bring
<input type="checkbox"/> Employment income	T4
<input type="checkbox"/> Taxable disability income	T4A
<input type="checkbox"/> Profit Sharing income	T4PS
<input type="checkbox"/> Commission income	T4 or T4A
<input type="checkbox"/> Old Age Security income	T4(OAS)
<input type="checkbox"/> Canada Pension Plan income	T4AP
<input type="checkbox"/> Other pension/annuity income	T4A
<input type="checkbox"/> RRSP income	T4RSP
<input type="checkbox"/> RRIF income	T4RIF
<input type="checkbox"/> Withdrawals from RRSP	T4RSP
<input type="checkbox"/> EI Benefits	T4E
<input type="checkbox"/> Worker's Compensation (WSIB)	T5007
<input type="checkbox"/> Social Assistance payments	T5007
<input type="checkbox"/> Dividend income	T3s and T5s
<input type="checkbox"/> Interest income	T5s
<input type="checkbox"/> Limited partnership income	T5013
<input type="checkbox"/> Rental property income	see next page
<input type="checkbox"/> Sale of real estate	see next page
<input type="checkbox"/> Sale of non-RRSP stocks	see next page
<input type="checkbox"/> Sale of non-RRSP mutual funds	see next page
<input type="checkbox"/> Self-employed income	see back page
<input type="checkbox"/> Alimony income	\$ _____
<input type="checkbox"/> Other income:	
_____	\$ _____
_____	\$ _____

Your current year Deductions/Credits  
Check if you have the following:  
Please include receipts.\*\*\*

Item	Amount
<input type="checkbox"/> Charitable donations	\$ _____
<input type="checkbox"/> Political party contributions	\$ _____
<input type="checkbox"/> Labour-sponsored funds contributions	\$ _____
<input type="checkbox"/> RRSP contributions	\$ _____
<input type="checkbox"/> Moving Expenses	\$ _____
<input type="checkbox"/> Tuition fees for yourself	\$ _____
<input type="checkbox"/> Children's/spouse's tuition fees	\$ _____
_____	

Please note amount and ensure that you have receipts  
to support the following items: (If unsure, attach receipts.)

<input type="checkbox"/> Employment expenses	see back page
<input type="checkbox"/> Alimony payments made	\$ _____
<input type="checkbox"/> Disability amount	\$ _____
<input type="checkbox"/> Medical expenses	\$ _____
<input type="checkbox"/> Rent Paid	\$ _____
<input type="checkbox"/> Property taxes paid	\$ _____
<input type="checkbox"/> Safety deposit box charges	\$ _____
<input type="checkbox"/> Legal fees for investment loan	\$ _____
<input type="checkbox"/> Investment loan interest	
_____	\$ _____
(Bank/Trust Company)	
<input type="checkbox"/> Tax instalments paid to the government	\$ _____
<input type="checkbox"/> Union dues, professional fees	\$ _____
<input type="checkbox"/> Child care expenses	\$ _____
<input type="checkbox"/> Other _____	\$ _____

\*\*\* If there is a discrepancy between the figures above and the receipts provided, we will use the total of the receipts provided.

**Other information you would like to tell us about:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*If you are not sure we'll need it, bring it along!*

### Self-Employed Income & Expenses

Name of Business \_\_\_\_\_

Type of Business \_\_\_\_\_

Joint Owner and % \_\_\_\_\_

**Income** \$ \_\_\_\_\_

**Expenses**

Cost of sales (purchases) \$ \_\_\_\_\_

Advertising \$ \_\_\_\_\_

Licenses, dues, fees \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Interest/bank charges \$ \_\_\_\_\_

Meals/entertainment \$ \_\_\_\_\_

Office supplies \$ \_\_\_\_\_

Legal & accounting \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Salaries \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Other expenses \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Equipment/furniture purchases (if you need more space, attach list)

\_\_\_\_\_ \$ \_\_\_\_\_

Registered for GST?  YES  NO

If yes, do the above figures include GST?

Automobile SEE ACROSS

Home Office SEE BELOW

### Home Office Expense

Business or Employment Use % \_\_\_\_\_

(percentage of house used for business or employment)

**Expenses** **Total for current year**

Heat \$ \_\_\_\_\_

Hydro \$ \_\_\_\_\_

Water \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Maintenance, repairs \$ \_\_\_\_\_

Mortgage Interest/Rent paid \$ \_\_\_\_\_

Property taxes \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

### Employment Expenses

Please ensure that you have a signed T2200 Declaration of Employment Conditions from your employer available should you be asked by the government to substantiate this claim.

**Expenses**

Accounting, legal fees \$ \_\_\_\_\_

Advertising, promotion \$ \_\_\_\_\_

Meals/entertainment \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_

Parking \$ \_\_\_\_\_

Office Supplies \$ \_\_\_\_\_

Telephone \_\_\_\_\_

Is your employer registered for GST? YES NO

Other expenses:

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Automobile SEE BELOW

Home Office SEE BELOW

### Automobile Expenses

**Year/make of Car:**

Purchase Price\*\*\* \$ \_\_\_\_\_

Year Purchased \_\_\_\_\_

Total Km driven in current year \_\_\_\_\_

Business or Employment Use % \_\_\_\_\_

**Expenses** **Total for current year**

Fuel \$ \_\_\_\_\_

Repairs \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Licensing \$ \_\_\_\_\_

Loan Interest \$ \_\_\_\_\_

Lease payments (per month & annual amount) \_\_\_\_\_

CAA membership \$ \_\_\_\_\_

Any per km flat allowance received \$ \_\_\_\_\_

Other expenses \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\*\*\*If leased vehicle, please provide fair market value on lease date.

<p><b>Rental Property Income &amp; Expenses</b></p> <p>Address _____</p> <p>Joint owner _____</p> <p>Jt. Ownership % _____</p> <p>Income (rent collected)                   \$ _____</p> <p><b>Expenses</b></p> <p>Advertising                                   \$ _____</p> <p>Insurance                                     \$ _____</p> <p>Mortgage Interest                         \$ _____</p> <p>Repairs                                       \$ _____</p> <p>Property Taxes                             \$ _____</p> <p>Salaries                                       \$ _____</p> <p>Utilities                                       \$ _____</p> <p>Condo Fees                                   \$ _____</p> <p>Other Expenses                             \$ _____</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>Major renovations &amp; purchases (ie. Appliances)</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p><i>If the property was purchased in the year, please provide the details.</i></p>	<p><b>Sale of Real Estate</b> (excluding personal residence)</p> <p>Address _____</p> <p>_____</p> <p>Date Sold _____</p> <p>Joint Owner _____</p> <p>Jt. Ownership % _____</p> <p>Date purchased _____</p> <p>Purchase price                               \$ _____</p> <p>Legal costs on purchase                   \$ _____</p> <p>Additions/major improvements:</p> <p>_____ \$ _____</p> <p>_____ \$ _____</p> <p>Sale Price                                     \$ _____</p> <p>Legal costs on sale                         \$ _____</p> <p>Commissions paid on sale                 \$ _____</p> <p>Other selling expenses                     \$ _____</p>
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<b>Sale of Non-RRSP Stock</b> (please provide broker's receipts for both the purchase and the sale)					
Name of Stock	Date Sold (dd/mm/yy)	Number of Shares	Sale* Price	Purchase* Price	Commissions Paid
*Price per share					

<p><b>Sale of Transfer of Non-RRSP Mutual Funds</b> (including systematic withdrawal programs)</p> <p>Please provide the current year end statements for all of your non-RRSP mutual funds. Those statements were sent to you by the mutual fund companies in January. The statements show all transactions for Current year, including any sale, redemption or transfer of your shares in the mutual fund during the year.</p> <p>List all of your mutual funds that had shares sold or transferred during the current year.</p> <p>_____</p> <p>_____</p> <p>_____</p>
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