

PERSONAL INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Apt./Suite – Building Number Street Name, City, Postal Code			Marital Status
Primary phone	Secondary phone	Fax	Email
Any family members disabled? YES ☐ NO ☐		Do you authorize CRA to provide information about you to Elections Canada? YES ☐ NO ☐	
SPOUSE'S INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
If we are not preparing your spouse's tax return: Taxable income figure from line 26000 of their tax return: _____			
If your marital status changed during the year, please provide the date it changed (MM/DD/YYYY): ____/____/____			
CHILDREN'S INFORMATION			
Full Name – Child 1	S.I.N.	Birthdate	Email
Attending Post-Secondary Institution? YES ☐ NO ☐ - If yes please attach T2202A			
Full Name – Child 2	S.I.N.	Birthdate	Email
Attending Post-Secondary Institution? YES ☐ NO ☐ - If yes please attach T2202A			
Full Name – Child 3	S.I.N.	Birthdate	Email
Attending Post-Secondary Institution? YES ☐ NO ☐ - If yes please attach T2202A			
SALE OF PRINCIPAL RESIDENCE			
Did you sell your principal residence during the year?			YES ☐ NO ☐
If YES: Year of Acquisition: _____ Proceeds of Disposition: _____			
Did you own any other properties that could qualify as a principal residence?			YES ☐ NO ☐
FOREIGN REPORTING			
Do you own foreign assets with a cost greater than \$100,000 CAD?			YES ☐ NO ☐
INCOME SOURCES CHECKLIST			
Employment (T4 or T4A)	☐	RRSP, RRIF, RESP (T4RSP/T4RIF/T4A) FHSA	☐
Government pensions (T4A[OAS]/T4A[P])	☐	Estates/Trusts/Mutual Fund (T3)	☐
Employment Insurance (T4E)	☐	Interest/Dividends/Capital Gains (T3/T5/T5013)	☐
Cryptocurrencies (Trading, Mining, Other)	☐		
TAX DEDUCTIONS / CREDITS CHECKLIST (with official receipts)			
RRSP Contributions & FHSA Contributions	☐	National Student Loan Interest	☐
Union/Professional Dues	☐	Medical Expenses (net of any reimbursements)	☐
Child Care Expenses (Incl. Name & SIN of Recipient)	☐	Charitable or Political Donations (official receipts)	☐
Moving Expenses (if at least 40km's closer to work)	☐	First-time Home Buyer?	☐
Accounting Fees (other than Lohn Caulder's fees)	☐	Eligible educator who pays for their own supplies?	☐
Interest/Fees Paid on Investments (Non-Registered)	☐	Tuition Fees (T2202A – Signed by Student)	☐
Number of days worked from home due to Covid 19	☐	Government Subsidy benefits (ie. CERB / CRB) repaid	☐

OTHER IMPORTANT DOCUMENTS CHECKLIST

Mutual Fund Investment Summary Statement	☐	Tax Shelters (T101/T5013/Annual Reports)	☐
Sale of Property: Address, Cost of property	☐	T2200 Employer Authorization for Expenses (or T2200s if worked from home due to Covid 19) (Please see Appendix C below)	☐
Sale of Property: Seller's Statement of Adjustments	☐	Court-Ordered Spousal Support Payments <i>Paid</i>	☐
Sale of Shares: Gain/Loss Summary from Broker	☐	Court-Ordered Spousal Support Payments <i>Received</i>	☐
New Clients: Notice of Assessment for Prior Year	☐	New Clients: T1 Tax Return Filed for Prior Year	☐
New Clients: Signed CRA Authorization Form (Included after Appendix C below)	☐	Other:	☐

OTHER INFORMATION CHECKLIST (please provide if necessary)

Rental Income and Expenses (Please provide detail listing of rental income and expenses per property below in Appendix A)	☐	List of foreign property owned, including:	☐
Self-Employment Income and Expenses (Please provide detail listing of the income and expenses below in Appendix B)	☐	Country of Origin	☐
Employment/Commission Expenses (Please provide detail listing of employment expenses in Appendix C)	☐	Fair Market Value at Year-End	☐
Other:	☐	Highest Fair Market Value for The Year	☐
Other:	☐	Total Income and Total Capital Gains	☐
		Signed T1 Engagement Letter (available online)	☐
		Other:	☐
		Other:	☐

INSTALLMENT PAYMENTS

Have you made installment payments for the tax year?	YES ☐ NO ☐
If YES: how much for yourself?	\$ _____
If YES: how much for your spouse?	\$ _____
If YES: how much for each child?	\$ _____

DIRECT DEPOSIT/ TAX REFUND

Has Your Direct Deposit Information Already Been Provided to CRA?	YES ☐ NO ☐
If NO: If You Would Like to Have Tax Refunds Directly Deposited, provide us with either:	☐
A Void Cheque	
OR	
Branch Number (5 digits)	_____
Institution Number (3 digits)	_____
Account Number (Maximum 12 digits)	_____

APPENDIX A: RENTAL PROPERTY SUMMARY* (Please prepare this form for EACH rental income-producing property)

DETAILS OF PROPERTY

Address of Rental Property: _____ City _____
 Province/State _____ Postal Code _____ Country _____
 Ownership Percentage (%) _____
 Full Name and SIN of Co-Owners _____

RENTAL INCOME:
Gross Rental Income

\$ _____

RENTAL EXPENSES:

Advertising \$ _____
 Insurance \$ _____
 Mortgage Interest \$ _____
 Office Expense \$ _____
 Legal & Accounting \$ _____
 Management & Admin \$ _____
 Repairs & Maintenance \$ _____
 Property Taxes \$ _____
 Travel \$ _____
 Utilities \$ _____
 Other (please specify) \$ _____

Net Rental Income

\$ _____

Did you pay for any major renovations or large purchases (i.e. appliances) during the tax year?

YES ☐ NO ☐

If "YES", please provide the details of the renovations/purchase and provide the cost amount below:

Renovation/Purchase

Amount Description

\$ _____
 \$ _____
 \$ _____
 \$ _____
 \$ _____

- * While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.



GoProTax Personal Tax Checklist

APPENDIX B: SELF-EMPLOYED INCOME AND EXPENSES (Please provide this form for EACH Business)

DETAILS OF BUSINESS:

Name of business _____ Type of business _____
Names of Partners and Percentage (%) owned _____

REVENUE:

Gross Receipts/ Sales \$ _____

EXPENSES:

Bad Debts \$ _____

Insurance \$ _____

Meals and Entertainment \$ _____

Interest & Bank Charges \$ _____

Licenses, Dues, and Memberships \$ _____

Office Expense \$ _____

Supplies \$ _____

Professional Dues \$ _____

Rent \$ _____

Repairs and Maintenance \$ _____

Salaries \$ _____

Travel \$ _____

Telephone and Utilities \$ _____

Vehicle Expenses:

Year, Make and Model _____

Kilometers Driven for Business _____ KMs

Total Kilometers Driven _____ KMs

If Leased, Date Lease began? _____

Purchase/Sale Price \$ _____

Gas _____

Insurance \$ _____

Repairs & Maintenance \$ _____

Interest on Auto Loans \$ _____

Leasing \$ _____

Is your business registered for GST?

YES ☐ NO ☐ If yes, what is your GST number? _____

Is GST included in the above amounts?

YES ☐ NO ☐

- * While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

APPENDIX C: EMPLOYMENT EXPENSES* (Please attach a signed T2200-Declaration of Employment conditions from your employer)

Travel	\$ _____
Parking	\$ _____
Office Supplies	\$ _____
Telephone	\$ _____
Office Rent	\$ _____

Vehicle Expenses (If Applicable):

Year and Make & Model	_____
Purchase/Sale Price	\$ _____
Date of Purchase/Sale	_____
If leased, Date Lease began?	_____
KMs driven for business purpose*	_____ Km's
Total KMs driving in the year*	_____ Km's
Fuel	\$ _____
Repairs & Maintenance	\$ _____
Insurance	\$ _____
Licensing & Registration Fees	\$ _____
Loan Interest	\$ _____
Lease payments	\$ _____
Car Washes	\$ _____
Parking	\$ _____
Other:	\$ _____

For Commission Employees only:

Accounting & Legal Fees	\$ _____
Advertising & Promotion	\$ _____
Meals and Entertainment	\$ _____
Rental of Office Equipment	\$ _____
Training	\$ _____

- * While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

Authorize a Representative – signature page

☒ Enable printing and EFILE of this authorization request

Select "EFILE Authorize a Representative" under the "EFILE" menu to file this authorization.

Instructions:

1. Print this page and have it signed and dated by the taxpayer or legal representative.
2. Retain a copy of the signed and dated signature page in your files for six years from the date that this information is transmitted to the Canada Revenue Agency (CRA). Do not send the signature page to CRA by mail or fax unless requested to do so.

Taxpayer information

SIN _____ First name _____ Last name _____

Representative information and authorization

☐ Individual Representative ID: _____

☒ Business Firm BN: _____

☐ Group Group ID: _____

Level of authorization (1 or 2): 2

Enter an expiry date, if applicable. _____

Signature and date

☐ I am the legal representative for this taxpayer.

By signing and dating this page, you authorize the Canada Revenue Agency to interact with the representative mentioned above.

Name of taxpayer or legal representative

Signature of taxpayer or legal representative

Date of signature