**Tax Preparation Checklist**

|  |  |
| --- | --- |
| **Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **Spouse**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| SIN : \_\_\_ \_\_\_ \_\_\_ - \_\_\_ \_\_\_ \_\_\_ - \_\_\_ \_\_\_ \_\_\_ | SIN : \_\_\_ \_\_\_ \_\_\_ - \_\_\_ \_\_\_ \_\_\_ - \_\_\_ \_\_\_ \_\_\_ |
| DOB :(mm/dd/yyyy) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | DOB :(mm/dd/yyyy) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Cell phone : ( ) - | Cell phone : ( ) -  |
| Email : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Email : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you a Canadian citizen?  Yes  No

Did you hold foreign property or securities with a total cost of over $100,000?  Yes  No

Is this return for a deceased taxpayer? (Please provide will & death certificate)  Yes  No

Do you have multiple years of tax returns to complete?  Yes  No

Did your address change during the tax year?  Yes  No

What was your province of residence on December 31st of the tax year? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Marital Status:**

* Married  Common-law  Widowed  Divorced  Separated  Single
* Marital Status Change Date of Change: (mm/dd/yyyy) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­ Previous status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Dependants**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Relationship** | **Date of****Birth (mm/dd/yyyy)** | **Social Insurance Number** | **Income** | **Qualifies for Disability** | **Post-Secondary Education** | **Attends Daycare/Preschool** |
|  |  |  |  |  | Y or N | Y or N | Y or N |
|  |  |  |  |  | Y or N | Y or N | Y or N |
|  |  |  |  |  | Y or N | Y or N | Y or N |
|  |  |  |  |  | Y or N | Y or N | Y or N |

**Sale of Real Estate**

**Sale of Property 1** **Sale of Property 2**

* Principal Residence  Other  Mixed-Use  Principal Residence  Other  Mixed-Use
* Owned multiple properties during same period  Owned multiple properties during same period

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purchase date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Purchase date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purchase price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Purchase price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sale price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sale price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***NEW CLIENTS: Please complete the “Authorizing a Representative” form (in office or at www.jeffblack.ca), provide photo ID and bank info (only if adding/changing Direct Deposit information).***

Tax returns are e-filed upon receipt of payment.

**Maximize your refund!**

***Please check all that apply to your income tax situation and provide all applicable slips and receipts.***

***Additional information may be requested.***

**INCOME SLIPS & RECEIPTS**

* T4 (employment)  T5007 (WSIB, OW, ODSP)  T5008
* T4A (pension or other income)  T4RSP  T4PS
* T4A(P) - CPP  T4RIF  T5013
* T4A(OAS)  T3 (investments)  T5018 (contract payments)
* T4E – Employment Insurance  T5 (interest & dividends)  tips $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Real or deemed sale of stocks, bonds or property  other income
* Self employment – see Self Employed Worksheet at www.jeffblack.ca or in office
* Rental income – see Rental Properties Worksheet at www.jeffblack.ca or in office

**CREDITS & DEDUCTIONS**

 RRSP contributions (incl Jan & Feb of current year)  Union or professional dues  Charitable donations

 Medical expenses (include travel > 40km one-way)  Tuition – T2202 form  Student loan interest

 Seniors Public Transit receipts  Adoption expenses  First time home buyer

 Home Buyers Plan participant  Lifelong Learning Plan participant  Firefighter or Search & Rescue Moving expenses (certain conditions need to be met)  Educator Supply credit (letter/T2200)  Completed TL2 – long haul

 Capital/non-capital losses of other years  Instalment payments to CRA  Investment management fees

 Disability Tax Credit (on file with the CRA)  Caregiver credit – name of dependant: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Childcare expenses (provide SIN if an individual)  Legal agreement for custody/support  Legal fees for support received

 Child support: received from / paid to (circle applicable) Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount: $\_\_\_\_\_\_\_\_\_\_\_\_

 Spousal support: received from / paid to (circle applicable) Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount: $\_\_\_\_\_\_\_\_\_\_\_\_

 Property tax or rent receipts (circle): Dates at that location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount paid in tax year: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Municipality/landlord: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Employment expenses (T2200/T2200S required) – see Employment Expense Worksheet at www.jeffblack.ca or in office

 Work from home due to Covid at least 50% of the time for four consecutive weeks

 How many days during 2022 did you work at home? (Do not include holiday, vacation or sick days) #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Do you wish to claim Work-space-in-the-home expenses?  Yes  No  Simplified method or  Detailed method

(Simplified: $2/day, max 250 days, no form required. Detailed: T2200S from employer, claim amounts & supporting documents required)

RECENT TAX UPDATES:

 Ontario Staycation receipts  Repaid Covid benefits  Digital News subscription

 If you are over 70, provide all 2022 receipts for medical expenses, even if medical expenses have not helped in prior years

 Modified/renovated your home to make it more accessible for someone over 65 years old or who has a disability

 Renovated your home to create a secondary living unit for an elderly or disabled family member

 If you are a construction worker that travelled over 150km and stayed at least 36 hrs at a temporary worksite

 Other (provide information):

Client signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_