**Tax Preparation Checklist**

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

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

**JOINT ASSETS \*\**This includes real estate, bank accounts and investment accounts***

Do you jointly own an asset with another person?  yes  no Type of asset:  real estate  bank account  investment

Joint owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Relationship: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date joint began: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address (if property): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Was the asset disposed of during the year?  yes  no Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Proceeds: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**REAL ESTATE**

Did you sell a property during the year?  Principal residence  Other  no

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Co-owner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Selling date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sale price: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Maximize your refund!**

***Please provide all applicable slips and receipts. Additional information may be requested. Contact the office for any inquiries.***

**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

 Digital News subscription  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)  Property tax or rent receipts

 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: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Employment expenses (T2200 required) – see Employment Expenses Worksheet on website or in office  Completed TL2 – truckers

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

 Medical expenses. Include travel > 40km one-way and transportation of a person with a disability to a more accessible home.

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

**RECENT TAX UPDATES**

Have you added or changed a name on the title of a property, bank account or investment account? - **NEW! Trust reporting**



Do you own a property that is NOT regularly inhabited – **NEW! Underused Housing Tax**



 Are you a FHSA participant? - **NEW! First Home Savings Account**

 Did you renovate your home to create a secondary living unit for an elderly or disabled family member? – **NEW! MHRTC credit**

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

Tax returns are e-filed upon receipt of payment.