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Personal Tax Information

Name _____ Taxation Year _____
 Address _____ SIN _____
 _____ Birth date _____
 _____ Telephone _____
 Email _____ Cell _____

Province of residence at December 31st _____

Self-employed (use checklist) Y / N Province of self-employment _____

If you became or ceased to be a Canadian resident in the tax year:
 Date of entry into Canada _____ Date of departure from Canada _____

Status at December 31st:

Single	<input type="checkbox"/>	Married	<input type="checkbox"/>	Common-law	<input type="checkbox"/>
	<input type="checkbox"/>	Divorced	<input type="checkbox"/>	Widowed	<input type="checkbox"/>

If status changed during the tax year, enter date of change _____

Deceased Date deceased _____

Spouse information:

SIN _____

Birth date _____

Telephone _____

Net income \$ _____

(Provide income if we are NOT preparing spouse's tax return)

Dependents - children / elderly parents / grandparents :

Name _____	Birth date _____	Relationship / SIN _____	Income _____
Name _____	Birth date _____	Relationship / SIN _____	Income _____
Name _____	Birth date _____	Relationship / SIN _____	Income _____
Name _____	Birth date _____	Relationship / SIN _____	Income _____

Disability:

Are you or any of your dependents have a disability? _____

Has a T2201 (Disability Tax Credit Certificate) been filed? _____

Personal Tax

Are you a Canadian citizen? N

Did you own property outside of Canada over \$100,000? N

Is your child transferring post-secondary tuition amount to you?
If yes, please provide copy of signed T2202A slip N

Did you make tax installment payments during the year? _____ Y

Did you participate in the Home Buyers Plan? Date _____ Y

Did you participate in the Lifelong Learning Plan? Amount \$ _____ Y

Are you including your last year's Notice of Assessment? Y

New clients - are you including your last year tax return and schedules? Y / N

Income

Personal

	T4 - Employment income
	Tips and gratuities
	T4A (OAS) – Old Age Security benefits
	T4A (P) – Canada Pension Plan benefits
	T4A – Pension and other income
	T4E – Employment Insurance benefits
	T5007 – WCB or Social Assistance benefits
	T4 RSP – RRSP income
	T4 RIF – RIF income
	RC 62 – Universal Child Care benefit
	T3 – Mutual Fund and Other Trusts

Investment

	T5/T3 – Interest and Dividend income
	T600 – Canada Savings Bonds
	T5008 – Statement of Security Transactions
	T5013 – Limited Partnership income
	Rental income and expenses (use checklist)
	Capital gains or losses (stocks, bonds, mutual funds, etc.) <small>(Brokers statements / trading slips including cost and sale details)</small>
	Disposition of real estate (cost and proceeds of sale)
	Borrow money to earn investment income
	Foreign interest or dividends
	Royalty or other investment income

Other

	Business income and expenses (use checklist)		RRSP withdrawals
	Alimony received (include name & SIN of payer)		Scholarships / bursaries
	Taxable child support (include name & SIN of payer)		Foreign income and taxes paid

Deductions & Tax Credits

	RRSP contribution receipts		Deductible legal fees
	Union or professional association dues		Childcare receipts (includes pre-school fees)
	Alimony paid (include name & SIN of recipient)		Eligible moving expenses
	Deductible child support paid (include name & SIN)		Allowable business investment losses
	Safety deposit box charges		Capital loss carry forwards
	Interest paid on monies borrowed for investments		Non-capital loss carry forwards
	Investment counsel and accounting fees		Limited partnership losses of other years
			Employment insurance benefit repayments
	Employment expenses (use checklist - T2200 required)		

	T2201 – Disability Deduction		Medical/dental/optical expenses (unreimbursed amount)
	T2202 – Tuition Fees / Education Credit		Premiums paid to private medical insurance plans
	T2202 – Tuition Fees transfer from child (form signed)		Adoption expenses
	Tuition fees over \$100 paid (post secondary)		Attendant care expenses
	Interest paid on student loans		Donations to registered charities
	Monthly public transit passes		Political contribution receipts
	Children's arts / fitness receipts (\$500 max per child)		Parent(s) over 65 or infirm relative live with you

Commission Employees

Do you have a signed Form T2200 - Declaration of Conditions of Employment → use the Employment Expenses checklist

Is there an amount in Box 42 of your T4 slip Y / N

Did you under your contract of employment have to pay for your own expenses. Y / N

Did you receive an allowance for the expenses? Amount \$ _____ Y

If so, is this allowance that was received included in your income? Y

You **cannot** deduct the cost of travel to and from work, or other expenses, such as most tools and clothing.

Allowable Expenses for Qualifying Employees

<input type="checkbox"/>	Accounting and legal	<input type="checkbox"/>	Annual license fees
<input type="checkbox"/>	Advertising, promotion, gifts	<input type="checkbox"/>	Lease costs (computers, cell phones, fax machines)
<input type="checkbox"/>	Food & beverages (away for over 12 consecutive hrs)	<input type="checkbox"/>	Training costs
<input type="checkbox"/>	Entertainment	<input type="checkbox"/>	Travel & lodging costs

Employed Tradesperson & Other

Cost of eligible tools bought in the year

Other eligible expenses

<input type="checkbox"/>	Apprentice mechanic tools expense	<input type="checkbox"/>	Musical instrument expenses
<input type="checkbox"/>	Tradespersons' tools expenses	<input type="checkbox"/>	Artists' employment expenses

Tradesperson must spend over \$1000

Other Information

Allow CRA to provide your name, address and date of birth to Elections Canada? Y / N

Are you a 1st time tax return filer? Y / N

Would you like to direct deposit your tax refund, GST credit and/or child tax benefit? Y / N

If YES, please attach VOID cheque

Has direct deposit information previously been supplied to CRA Y

Do you agree to income splitting your pensions with your spouse? Y

Has your last name changed? Y

Did you reside on Tilcho lands (NT) during the year? Y

Do you have foreign citizenship? Which country? _____ Y

Efile your personal tax return? Y

Please note, no items will be included onto your tax return without the proper documentation. In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

Signature: _____ Date: _____