

PLEASE COMPLETE AND RETURN WITH YOUR DOCUMENTS

Please provide an email address for each individual. We will be using electronic signatures and will be sending out an electronic copy of your tax returns. To simplify signing, we will send each individual their return if an email address is provided.

Personal Information

			Own foreign property over \$100,000?	
			Yes	No
Name	Phone	Email	<input type="checkbox"/>	<input type="checkbox"/>
Spouse/Partner	Phone	Email	<input type="checkbox"/>	<input type="checkbox"/>
Dependent	Phone	Email	<input type="checkbox"/>	<input type="checkbox"/>
Dependent	Phone	Email	<input type="checkbox"/>	<input type="checkbox"/>
Dependent	Phone	Email	<input type="checkbox"/>	<input type="checkbox"/>

Please advise us of any significant life events which occurred last year, such as:

- change in marital status ● change in address ● new dependents ● medical intervention to conceive a child ● adoption expenses ● death or impairment of a relative (caregiver) ● if you sold your home in 2023, please provide the year of purchase, the amount sold for, and your new address.

Please provide all of the following, where applicable:

- **Information slips** such as T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T10, T2200, T2202, T101, T1163, T1164, TL11A, TL11B, TL11C, T5003, T5007, T5008, T5013, T5018
- **Receipts** such as RRSP contributions, instalment payments, property taxes, rent paid, childcare expenses, charitable donations, medical expenses, interest paid on student loans, eligible educator school supplies, union or professional dues.

Use this checklist to assist in gathering all the necessary information to complete your tax return

<p>EMPLOYMENT EXPENSES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Vehicle & Office Expenses (Form T2200 Required) <input type="checkbox"/> Sales Expenses (Summarized) <input type="checkbox"/> Relocation Expenses <input type="checkbox"/> Meals & Lodging (Form TL2 Completed) <p>SELF-EMPLOYMENT/COMMISSION INCOME</p> <ul style="list-style-type: none"> <input type="checkbox"/> Income & Expenses (Summarized) <input type="checkbox"/> Home Office, Vehicle (Travel Log Book) <input type="checkbox"/> Internet Business Activities - Details <input type="checkbox"/> Purchase/Sale Assets - Details <input type="checkbox"/> Registered for HST (Business Number) <input type="checkbox"/> Do you require your HST to be filed? <p>OTHER INCOME</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tips & Gratuities <input type="checkbox"/> Spousal Support Received/Paid (Court Order) <input type="checkbox"/> Foreign Income (e.g. Pensions, Investments) <p>NEW TAX CREDITS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Multigenerational Home Renovation Tax Credit 	<p>RENTAL INCOME AND EXPENSES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Purchase/Sale Property - Details <input type="checkbox"/> Income & Expenses (Summarized) <input type="checkbox"/> Personal & Rental Use (Percentage of Use) <input type="checkbox"/> Repairs, Maintenance, Improvements - Details <p>INVESTMENT INCOME AND EXPENSES</p> <ul style="list-style-type: none"> <input type="checkbox"/> Investment Trading Summary <input type="checkbox"/> Interest Paid Related to Investment Income <input type="checkbox"/> Investment Management Fees <input type="checkbox"/> Accounting Fees to Record Income <input type="checkbox"/> Purchase/Sale of Other Property - Details <p>OTHER DEDUCTIONS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Disability Tax Credit <input type="checkbox"/> Legal Fees to Collect Income/Support <input type="checkbox"/> Digital News Subscription Expenses <input type="checkbox"/> Canada Training Credit <input type="checkbox"/> Home Accessibility Tax Credit <input type="checkbox"/> First Home Savings Account Contributions
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