

Welcome to our office

Please take the time to fill in this form so we know that we have received all of the necessary information to complete your income tax return(s):

2021

	YOU			SPOUSE		
LAST NAME						
FIRST NAME						
Previous last name? (If it changed since your last tax return was filed)						
Birthdate						
SIN						
Tax Returns Included:	2018	2019	2020	2018	2019	2020
Copy of 2020 Notice of Assessment	Included	Can't find		Included	Can't find	
Are you a Canadian citizen?	YES	NO		YES	NO	
Did you spend more than 122 days in the US in 2021?	YES	NO		YES	NO	
If yes , have you filed your Form 8840 with the IRS?	YES	NO		YES	NO	
Are you a U.S. Citizen, Green Card Holder or considered to be a U.S. person?	YES	NO		YES	NO	

Mailing Address (indicate if there are different addresses for each person above):

Home Phone Number:

Fax Number:

FOR OUR OFFICE USE:

	YOU	SPOUSE
Cell		
Email		

(We will use these email addresses for our secure portal, e-signatures, and any other email communication)

What was your marital status on December 31, 2021?

- | | |
|--------------------|-----------|
| Married | Separated |
| Living common-law* | Divorced |
| Single* | Widowed |

Was there a change in your marital status during the year or since Dec. 31, 2021?

(ie. Single to Common Law*). YES NO

If yes, what was the change and on what date? _____

Please state your province of residence at December 31, 2021: _____

**Living common law means you have lived with someone in a conjugal relationship for 12 consecutive months or you live together and have a child in common living in your home. If you require a definition of "conjugal", please ask for the detailed definition.*

Number of dependant persons who live with you? _____

Please provide the information below:

Dependant 1. (not you or your spouse) NAME _____ SIN _____ Birthdate (mm/dd/yy) _____ Citizenship _____ Relationship to you _____ Qualify for disability tax credit? Y N Copy of 2020 notice of assessment Included Can't find Did not file Tax return included: 2018 2019 2020 Did not file	Dependant 2. (not you or your spouse) NAME _____ SIN _____ Birthdate (mm/dd/yy) _____ Citizenship _____ Relationship to you _____ Qualify for disability tax credit? Y N Copy of 2020 notice of assessment Included Can't find Did not file Tax return included: 2018 2019 2020 Did not file
Dependant 3. (not you or your spouse) NAME _____ SIN _____ Birthdate (mm/dd/yy) _____ Citizenship _____ Relationship to you _____ Qualify for disability tax credit? Y N Copy of 2020 notice of assessment Included Can't find Did not file Tax return included: 2018 2019 2020 Did not file	Dependant 4. (not you or your spouse) NAME _____ SIN _____ Birthdate (mm/dd/yy) _____ Citizenship _____ Relationship to you _____ Qualify for disability tax credit? Y N Copy of 2020 notice of assessment Included Can't find Did not file Tax return included: 2018 2019 2020 Did not file

If additional people live with you, please attach a separate sheet containing all of the above information

Are any of these individuals living with you not having their tax return prepared here?

YES NO

If yes, who and how much is Line 23600 of their 2021 tax return? If they qualify for the disability tax credit, provide a copy of their 2021 tax return.

Where did you hear about us? If you were referred here, then by whom?

Have you had direct deposit of your tax refund in prior tax years? * YES NO

If your banking information has changed and you have not updated it with the Canada Revenue Agency, please ask us how to do this.

If no, would you like to start Direct Deposit? YES NO

If yes: - If you have MyAccount with CRA, you can set up your Direct Deposit online.

- You may also call 1-800-959-8281 to set up.

- If you want to set this up for Climate Action Incentive benefits and next tax season, please request a direct deposit form to fill in and provide a voided cheque.

* Note your direct deposit continues with the Canada Revenue Agency until **you** cancel it.

A PDF copy of your tax return will be created and will be available as a download from our secure web portal. A printed copy will also be provided to you unless you prefer to be paperless.
If you DO NOT want a paper copy of your return, check here.

PLEASE READ EACH QUESTION CAREFULLY

1. FOREIGN PROPERTY / INCOME	YES	NO
Did you answer “yes” to any of the Foreign Property questions? If yes , please provide details.		
Did you receive income from any foreign sources? If yes , please provide details.		
2. CHILDREN		
Do you have dependant children? <i>If no, please proceed to section 3</i>		
Are you married to or living common-law with the other parent of your child(ren)? If no , would you like information about the possibility of splitting the Canada Child Benefit?		
Did you adopt a child in 2021? If yes , provide details of all adoption expenses.		
Did you incur child care expenses? (ie. daycare, playschool, camps – 5 day min) If yes, provide receipts.		
Do you have children attending post-secondary schooling? If yes , are they transferring their tuition and education amounts to you? If your child is transferring their tuition amounts to you, please provide a T2202A signed by the child and a copy of their 2021 tax return if we are not preparing it.		
3. DIVORCED OR SEPARATED		
Have you ever been divorced or separated? <i>If no, please proceed to section 4</i>		
Do you pay or receive spousal support or child maintenance? If yes , provide a signed copy of the court order and details of amounts paid and received.		
Did you incur legal costs during the year to collect late support payments, establish the amount of support payments you would receive, increase the support payments you receive or to vary an existing child support agreement where you are the recipient? If yes , provide receipts.		
4. SENIORS AND / OR RETIRED		
Are you or your spouse a senior and / or retired? <i>If no, please proceed to section 5</i>		
Do you or your spouse receive CPP? If yes , are you aware of the child rearing drop out provision and did you apply for it if you were entitled to it?		
Are you or your spouse still receiving a T4 for employment income? If yes , have you filled in a CPT30 to elect to stop paying CPP?		

	YES	NO
Do you or your spouse receive a pension other than CPP or OAS? If yes , would you like to minimize income taxes by splitting the taxable pension amount?		
Do you or your spouse receive pension from a foreign country? If yes : AMOUNT _____ (Cnd \$) COUNTRY _____ Provide documentation, if available.		
If you receive US Social Security, have you been receiving it since before January 1, 1996?	N/A	
5. SAVINGS OR INVESTMENTS		
Do you or your spouse have savings accounts, registered accounts, or investments? <i>If no, please proceed to section 6.</i>		
Did you make RRSP contributions from March 2 to December 31, 2021?		
Did you make RRSP contributions from January 1 to March 1, 2022?		
Have you participated in the Home Buyers Plan or Life Long Learning Plan?		
Do you have a Tax Free Savings Account (TFSA)? If yes , did you receive a penalty letter from the Canada Revenue Agency claiming that you had over contributed? (If yes , provide a copy of letter.)		
Did you pay interest on money borrowed to invest?		
Do you have other investments outside your RRSP and TFSA? If yes, provide details of your other investments (real estate, oil and gas, labour sponsored funds).		
Did you pay fees for investment advice outside your RRSP or TFSA? If yes , please provide details.		
Did you sell any investments? (ie. Stocks, bonds, mutual funds, ETFs, etc.) If yes , please provide details on the sale (<i>sale amount, original cost, elected amount from 1994</i>) and/or a gain/loss report for sales of stocks, bonds, mutual funds, ETFs, etc.		
Do you or your spouse have unrealized losses in your individual investment portfolio? If yes , did the spouse who did not have the unrealized losses incur tax on capital gains in the last three years?		
Did you convert any investments (outside of your RRSP or TFSA) from one name to another? (ie. Did you exchange mutual fund A for B or Trust Fund A to Corporation A)?		
Did you have a loss on any investments and then buy them back within 30 days or transfer them to another account that you own? Please provide detailed documentation.		
6. STUDENTS		
Was anyone included on this checklist a student in 2021 or have tuition credits carrying forward? <i>If no, please proceed to section 7</i>		
Did you attend post-secondary school? If yes , provide the T2202A .		
Did your employer pay the tuition fees?		
Were you enrolled full time in a post secondary institute?		
Were you enrolled part time in a post-secondary institute?		

	YES	NO
Did you pay additional fees for exams or other mandatory fees in anticipation of earning a professional status or trade? If yes , are these fees included on your T2202A? If not, provide receipts.		
Did you pay fees for an occupational skills course? If yes , provide the T2202A or letter of certification from the educational institution. (If you paid through your business, make sure not to double claim.)		
Do you have tuition amounts carrying forward and have changed your province of residence since attending school?		
Did you move to go to post-secondary school and have taxable income? If yes , please fill out the Moving Expenses checklist.		
7. MOVING OR RENOVATING		
Did you move or renovate in 2021? <i>If no, please proceed to section 8</i>		
Did you incur moving expenses? If yes , please fill out the Moving Expenses checklist.		
Did you move into a newly built home or did you renovate at least 90% of your home in 2020 or 2021? (to qualify, you must have moved interior walls). If yes , and the fair market value is less than \$450,000, have you claimed the GST credit yet?		
Did you become the owner of a home in 2021? If yes , had you owned another home within the last 5 years?		
Are you or anyone living in your household age 65 or older OR entitled to the disability tax credit and did renovations on your home? If yes , please provide copies of all home renovations that you paid to gain access, enhance mobility, or reduce the risk of harm of living in your home.		
8. REAL ESTATE		
Did you sell or have your name removed off title of any real estate in 2021? (This may include land, home, vacation property, business, farm, investment, or rental property - inside or outside Canada) (Section 1 or 4)		
Did you change all or some of your personal residence to a rental property in 2021? (Section 2)		
Did you convert a rental property that you own to your personal residence in 2021? (Section 3) If yes , to any of the above real estate questions, please fill in a Real Estate Checklist (section indicated above).		
9. OTHER DEDUCTIONS		
Are you paying off Canadian or provincial government sponsored student loans? If yes , provide details of interest paid.		
Did you pay a fee to prepare your 2020 tax return? If yes , provide the receipt.		
Did you pay professional dues or union dues? (If not included on your T4, please provide receipts)		
Did you make charitable donations? If yes , provide receipts.		
Did you make political contributions? If yes , provide receipts.		

	YES	NO
<p>Did you pay for medical expenses? If yes, provide all receipts including for dependants living with you. (Please EXCLUDE any cosmetic procedures or ask us about this) Please check off all medical that applies (this list is not exhaustive):</p> <ul style="list-style-type: none"> <input type="checkbox"/> • Private health plan premiums <input type="checkbox"/> • Out of country / province medical insurance premiums <input type="checkbox"/> • Prescriptions (summary from pharmacy is preferred) <input type="checkbox"/> • Optometry / eyeglasses / contacts <input type="checkbox"/> • Dental <input type="checkbox"/> • Chiropractor <input type="checkbox"/> • Nursing care, attendant care, seniors home <input type="checkbox"/> • Fertility treatments (include any not claimed in the last 10 years) <input type="checkbox"/> • Other _____ 		
<p>Were you required to travel for a medical service not available within 40 km of your home? If yes, please fill in the Medical Trip List or provide your own list with the same details (including if a driver was needed).</p>		
<p>Are you or someone in your immediate family disabled? If yes, is this an ongoing claim? If this is your first claim, provide a signed T2201 from your doctor.</p>		
<p>Are you the caregiver for any infirm family members? If yes, list the family member and their infirmity.</p> <p>_____</p>		
<p>Do you or does someone on this checklist have any of the following medical conditions? <i>(Some illnesses may provide additional deductions on your income tax return.)</i></p> <ul style="list-style-type: none"> • Celiac disease? • Epilepsy? • Type 1 Diabetes? • Other (please specify) _____ <p>Who has the condition and how long have they had it? Name: _____ How Long: _____</p>		
<p>Did you pay for a subscription to any Canadian digital news outlets? If yes, provide a receipt with the Qualified Canadian Journalism Organization number on it.</p>		
<p>Did you live in a prescribed Northern zone for at least 6 consecutive months in 2021? If yes, please provide details: Dates: _____ Physical Address: _____ Number of persons living with you and their relationship to you: _____</p> <p>Provide receipts for eligible travel (medical and up to two vacations) in 2021</p>		
<p>Did you prepay tax installments directly to CRA for your 2021 tax return? If yes, provide proof of payment.</p>		

	YES	NO
Are you an emergency volunteer who received an honorarium for your volunteer work?		
Are you a member of a volunteer fire department where you participated in at least 200 hours of service during the year?		
Are you a Search and Rescue member who volunteered at least 200 hours of service during the year?		
Are you a member of the clergy? If yes , provide a T1223		
10. INCOME / SELF EMPLOYMENT		
Do you have any information slips? Please provide all you have: (ie. T3, T4, T4A, T5, T4A(OAS), T4A(P), T4E, T4RIF, T4RSP, T10, T5007, T5008, T5013, T5018, etc.)		
Did you invest in, purchase, mine, sell or use to purchase something else using crypto, virtual, or digital currencies (ie. Bitcoins) in 2021? If yes , please provide details.		
Did you collect any taxable COVID benefits (CRB, CRCB, CRSB, CWLB, \$500 senior payment, Alberta Isolation Benefit, other)? If yes , provide T4A, T4E, or T5007		
Did you repay any of the benefits in 2021? If yes , how much did you repay and when? _____		
If yes , did you repay 2020 benefits and deduct it on your 2020 tax return? <i>The following COVID benefits are non-taxable so we do not require paperwork related to them: GST credit, Canada Child Benefit, one-time disability payment.</i>		
Do you have any other income earned or benefits received that is not reported on a T-slip? (ie. Contract work, honorariums, directors fees, crowdfunding). Please specify: _____		
Have you received any incentive rebate payments related to your work that has not been reported on a T-slip or your business income? If yes , please provide details.		
Did you receive interest, dividends, capital gains, partnership income, trust income or benefits from a business in which a relative is a key person (in terms of ownership or involvement)? If yes , provide details of income and relationship involved: Income: _____ Relationship involved: _____		
Do you have an unincorporated business other than farming? If yes , please fill in the Business Checklist .		
Do you receive income from internet sales of goods or services of \$1,000 per month or more? If yes , please fill in a Business Checklist .		
Do you farm? If yes , please fill in the Farm Checklist .		
Do you own rental property? If yes , please fill in a Rental Checklist for each property.		
Have you received money or any other commodity as a result of listing personal assets for use by others besides family or friends (the sharing economy such as AirBnB, VRBO, Uber)? If yes , please fill in the appropriate Business or Rental Checklist .		

	YES	NO
Did you operate a business and pay interest on personal loans? <i>If yes, please ask Valerie how to possibly convert this to a business expense.</i>		
If you are self-employed, have you opted into the EI program for special benefits?		
11. EMPLOYMENT EXPENSES (& APPRENTICES)		
Was anyone on this checklist an employee at any time in 2021? <i>If no, please proceed to section 12</i>		
Were you required to pay employment expenses (which may include workspace in your home)? <i>You may want to consider estimating the benefit of claiming expenses before spending the time to collect the information. Search for "CRA office in home calculator" online to do an estimate.</i> If yes, fill in the Employee Expense Checklist if you want to claim a deduction.		
Does anyone covered on this checklist work in the hospitality industry (ie, restaurant, casino, hotel, tourism, spa, salon)? If yes, please fill in the Tips Declaration Form.		
Are you an employed teacher or early childhood educator who paid for consumable supplies, durable goods or technological devices used for work that you were not reimbursed for? If yes, provide the required certification from your employer and copies of your receipts.		
Are you an apprentice? If yes, have you applied for and received the grants you are entitled to?		
Were you an apprentice mechanic or tradesperson and spent more than \$1,257 on <u>new</u> tools in 2021? If yes, provide a list with date, description and amount spent signed by employer, receipts and a signed T2200.		
Are you an employee in the transport industry and have expenses to claim? If yes, fill in the Transport Employee Checklist.		
12. OTHER INFORMATION		
Do you have a will?		
Would you like information about Home Buyer programs related to purchasing your first home or after a marital status change?		
Would you like information about RESPs for your children or grandchildren?		
Would you like information about grants and bonds available from the federal government for people under 60 with a disability?		
Do you own a life insurance policy, either personally or corporately?		
We are working with Collin Noble from CORE Wealth Solutions to assist our clients achieve their financial goals. Would you like additional information about this service?		

13. NEXT YEAR TAXES	YES	NO
Would you like us to send a 2022 personal tax package without you first contacting our office?		
If yes , indicate your preferred delivery method: <input type="checkbox"/> ShareFile <input type="checkbox"/> Canada Post <input type="checkbox"/> Phone for pick-up		

If there is anything else you want to tell us, please include it here: