

VAIVE AND ASSOCIATES

PROFESSIONAL CORPORATION

441 MacLaren Street, Suite 200A, Ottawa, Ontario K2P 2H3
Phone: (613) 369-5064 Fax: (613) 695-7655 Web: vaiveandassociates.ca

Personal Tax Return Organizer

Name:						
Address:						
	City:		Prov:		Postal Code:	
Business Phone:				Home Phone:		
Email Address:				Cell Phone:		
SIN:				Date of Birth (d/m/y)		

How would you like to be contacted? E-mail Work phone Home phone Cell phone

Would you like to receive your tax return in electronic format (PDF copy uploaded to our secure client portal) or in full paper format?
 PDF on secure portal (default) Full paper copy

Would you like to receive your returned documents or tax return by courier (at no extra charge)? Yes (default) No
If we are couriating the package to your home, can it be left in your mailbox if you are not home? Yes No

Please indicate where you would like us to courier the package to (couriers cannot be sent to Postal Boxes):

Same address as above Different address (please complete box below)

Name & Address:						
	City:		Prov:		Postal Code:	

US Citizen/Green Card Holder: Yes No

If yes, are we preparing a Canadian Tax return; a US Tax return; or both? CDN US Both

Marital Status: Married Divorced Single
 Widowed Separated Common Law

Did your marital status change in the year? If so date of change (d/m/y): _____

Are we also preparing a return for your spouse? Yes No

SPOUSAL INFORMATION:

Name		Net Income <small>(Only if we are not preparing your spouse's return)</small>	
SIN		Date of Birth (d/m/y)	

DEPENDANT CHILDREN:

Child's Name	Date of Birth (d/m/y)	Net Income	Attending University

Do you wish to enroll in the CRA Online Mail program? Yes No (if left unanswered, No will be selected automatically)
Do you wish to sign up for direct deposit? Yes No (if Yes, please provide a voided cheque or direct deposit form)
Foreign assets with cost amount > \$100,000? Yes No
Are you a beneficiary of a foreign trust? Yes No
Self-Employed Individuals – GST/HST registrant? Yes No
- Are we preparing the GST/HST return? Yes No
Have you included a signed engagement letter? Yes No

This question must be answered before your return can be e-filed.

Do you agree to the Canada Revenue Agency providing, over the next 12 months, your name, address, and date of birth to Elections Canada to help keep up to date your information currently on the National Register of Electors?

Yes No (if left unanswered, NO will be selected automatically)

PERSONAL INCOME TAX RETURN CHECKLIST

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> T4 Slips - Employment income, tips <input type="checkbox"/> T4A Slips - Pension, annuity, other income <input type="checkbox"/> T4A(OAS) - Old Age Security income <input type="checkbox"/> T4A(P) – Canada Pension Plan benefits <input type="checkbox"/> T4E - Employment Insurance benefits <input type="checkbox"/> T4RIF – Income from RRIF <input type="checkbox"/> T4RSP – Income from RRSP <input type="checkbox"/> T4RCA – Distributions from retirement compensation arrangement <input type="checkbox"/> T5 - Bank interest or taxable dividends <input type="checkbox"/> T3 - Statement of trust income <input type="checkbox"/> T5007 – Statement of Benefits <input type="checkbox"/> T5008 – See capital gains <input type="checkbox"/> T5013 - Statement of partnership income <input type="checkbox"/> Capital gains/losses – sale proceeds, cost base, commissions | <ul style="list-style-type: none"> <input type="checkbox"/> Sale of house – statement of adjustments, description, year of purchase <input type="checkbox"/> First Time Home Buyer – Closing Date: _____ <input type="checkbox"/> Homebuyer’s Plan <input type="checkbox"/> Moving expenses (will be reviewed by CRA) <input type="checkbox"/> Adoption expenses <input type="checkbox"/> Union or professional dues <input type="checkbox"/> Child care receipts (incl. SIN of caregiver) <input type="checkbox"/> Alimony/Support payments (incl. name and SIN of payer/recipient) <input type="checkbox"/> Interest, broker expense & carrying charges <input type="checkbox"/> RRSP contribution receipts \$ <input type="checkbox"/> Rent/Property Taxes paid in Ontario <input type="checkbox"/> Lifelong Learning Plan <input type="checkbox"/> T2202 Tuition certificate (page 2 signed for transfers from children) <input type="checkbox"/> Interest on government student loans <input type="checkbox"/> Charitable donation receipts <input type="checkbox"/> Tax shelter information <input type="checkbox"/> Public transit receipts (Ontario - If 65 or older) <input type="checkbox"/> Medical receipts (claims > \$6,000 likely subject to CRA review) <input type="checkbox"/> Are you or any family members disabled? <input type="checkbox"/> Made renovations for medical reasons? <input type="checkbox"/> Are you a volunteer firefighter? <input type="checkbox"/> Are you an eligible educator? <input type="checkbox"/> Was there a death in the family? (incl. death certificate and will) <input type="checkbox"/> Federal tax installments <ul style="list-style-type: none"> 1) Federal: \$ 2) Provincial (QC only): \$ <input type="checkbox"/> Prior year’s Notice of Assessment or Reassessment <input type="checkbox"/> Copies of any Foreign tax filings and associated assessments |
|--|---|
- Home Office Expenses (Flat Rate up to \$500)
 - Worked from home for at least 4 consecutive weeks (>50% of the time) due to COVID-19
 - # of days worked from home _____ (max. 250)
 - OR-**
 - Home Office Expenses (Detailed)
 - T2200S – Conditions of Employment (**required prior to filing return**)
 - Summary of home office expenses (rent/prop. taxes, utilities, maintenance, insurance, phone & internet, supplies)
 - Workspace Area _____ Total Area _____ (sq. ft.)
- Employment Expenses
 - T2200 - Conditions of employment (**required prior to filing return**)
 - I will provide a summary of employment expenses including auto expenses (# of business KMs and personal KMs driven during the year), supplies, telecommunications, tradesperson tools, travel and entertainment and home office (see *Home Office Expenses (Detailed)* above)
 - Rental properties - revenue & expenses
(if bought or sold in the year please provide statement of adjustments and trust ledger)
 - Summary of self-employment - revenues and expenses

Is there anything else that you think we should know when preparing your return, or other comments about delivery, etc.?