

# VAIVE AND ASSOCIATES

PROFESSIONAL CORPORATION

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## Personal Tax Return Organizer

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

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)

<b>Name &amp; Address:</b>						
	<b>City:</b>		<b>Prov:</b>		<b>Postal Code:</b>	

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:

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

### 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  
Do you own residential property as a trustee/partner?  Yes  No (if Yes, please contact us with the property details)

### 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

**\*NEW:** Ontario Staycation Tax Credit (*effective 2022 and 2023*): Ontario residents can claim 20% of their accommodation expenses for a leisure stay of less than a month in Ontario (hotel, motel, resort, lodge, B&B, cottage, campground, vacation rental). Please provide Ontario accommodation receipts if applicable.

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| <ul style="list-style-type: none"> <li><input type="checkbox"/> T4 Slips - Employment income, tips</li> <li><input type="checkbox"/> T4A Slips - Pension, annuity, other income</li> <li><input type="checkbox"/> T4A(OAS) - Old Age Security income</li> <li><input type="checkbox"/> T4A(P) – Canada Pension Plan benefits</li> <li><input type="checkbox"/> T4E - Employment Insurance benefits</li> <li><input type="checkbox"/> T4RIF – Income from RRIF</li> <li><input type="checkbox"/> T4RSP – Income from RRSP</li> <li><input type="checkbox"/> T4RCA – Distributions from retirement compensation arrangement</li> <li><input type="checkbox"/> T5 - Bank interest or taxable dividends</li> <li><input type="checkbox"/> T3 - Statement of trust income</li> <li><input type="checkbox"/> T5007 – Statement of Benefits</li> <li><input type="checkbox"/> T5008 – See capital gains</li> <li><input type="checkbox"/> T5013 - Statement of partnership income</li> <li><input type="checkbox"/> Capital gains/losses – sale proceeds, cost base, commissions</li> </ul> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <ul style="list-style-type: none"> <li><input type="checkbox"/> Home Office Expenses (Flat Rate up to \$500)           <ul style="list-style-type: none"> <li><input type="checkbox"/> Worked from home for at least 4 consecutive weeks (&gt;50% of the time) due to COVID-19</li> <li><input type="checkbox"/> # of days worked from home _____ (<i>max. 250</i>)</li> </ul> </li> <li style="text-align: center;"><b>-OR-</b></li> <li><input type="checkbox"/> Home Office Expenses (Detailed)           <ul style="list-style-type: none"> <li><input type="checkbox"/> T2200S – Conditions of Employment (<b>required prior to filing return</b>)</li> <li><input type="checkbox"/> Summary of home office expenses (rent/prop. taxes, utilities, maintenance, insurance, phone &amp; internet, supplies)</li> <li><input type="checkbox"/> Workspace Area _____ Total Area _____ (<i>sq. ft.</i>)</li> </ul> </li> </ul> </div> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employment Expenses           <ul style="list-style-type: none"> <li><input type="checkbox"/> T2200 - Conditions of employment (<b>required prior to filing return</b>)</li> <li><input type="checkbox"/> 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 <i>Home Office Expenses (Detailed)</i> above)</li> </ul> </li> <li><input type="checkbox"/> Rental properties - revenue &amp; expenses<br/><i>(if bought or sold in the year please provide statement of adjustments and trust ledger)</i></li> <li><input type="checkbox"/> Summary of self-employment - revenues and expenses</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Sale of house – statement of adjustments, description, year of purchase, closing date: _____</li> <li><input type="checkbox"/> First Time Home Buyer – Closing Date: _____</li> <li><input type="checkbox"/> Homebuyer’s Plan</li> <li><input type="checkbox"/> Moving expenses (receipts required for CRA review)</li> <li><input type="checkbox"/> Adoption expenses</li> <li><input type="checkbox"/> Union or professional dues</li> <li><input type="checkbox"/> Child care receipts (incl. SIN of caregiver)</li> <li><input type="checkbox"/> Alimony/Support payments (incl. name and SIN of payer/recipient)</li> <li><input type="checkbox"/> Interest, broker expense &amp; carrying charges</li> <li><input type="checkbox"/> RRSP contribution receipts <span style="border: 1px solid black; padding: 2px 10px;">\$</span></li> <li><input type="checkbox"/> Rent/Property Taxes paid in Ontario</li> <li><input type="checkbox"/> Lifelong Learning Plan</li> <li><input type="checkbox"/> T2202 Tuition certificate (page 2 signed for transfers from children)</li> <li><input type="checkbox"/> Interest on government student loans</li> <li><input type="checkbox"/> Charitable donation receipts</li> <li><input type="checkbox"/> <b>(*NEW)</b> Ontario accommodation receipts</li> <li><input type="checkbox"/> Tax shelter information</li> <li><input type="checkbox"/> Public transit receipts (Ontario - If 65 or older)</li> <li><input type="checkbox"/> Medical receipts (claims &gt; \$6,000 likely subject to CRA review)</li> <li><input type="checkbox"/> Are you or any family members disabled?</li> <li><input type="checkbox"/> Renovations to your home to improve accessibility?</li> <li><input type="checkbox"/> Are you a volunteer firefighter?</li> <li><input type="checkbox"/> Are you an eligible educator?</li> <li><input type="checkbox"/> Was there a death in the family? (incl. death certificate and will)</li> <li><input type="checkbox"/> Federal tax installments           <ul style="list-style-type: none"> <li>1) Federal: <span style="border: 1px solid black; padding: 2px 10px;">\$</span></li> <li>2) Provincial (QC only): <span style="border: 1px solid black; padding: 2px 10px;">\$</span></li> </ul> </li> <li><input type="checkbox"/> Prior year’s Notice of Assessment or Reassessment</li> <li><input type="checkbox"/> Copies of any Foreign tax filings and associated assessments</li> </ul> |
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Is there anything else that you think we should know when preparing your return, or other comments about delivery, etc.?