



NEW CLIENTS - PERSONAL INCOME TAX RETURN CHECKLIST and DECLARATION

Complete Pages 1 and 2 and email to S Kelly & Company Ltd

<u>TAX YEAR :</u> _____			
Family Head		Spouse	
First Name:	Last Name:	First Name:	Last Name:
Address:		Postal Code:	
Address Change This Year: Yes <input type="checkbox"/> No <input type="checkbox"/>			
Phone:		Phone:	
E-mail:		E-mail:	
Date of Birth:		Date of Birth:	
SIN:		SIN:	
Marital Status: Single <input type="checkbox"/> Common-law <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/>			
Change in Marital Status This Year: Yes <input type="checkbox"/> No <input type="checkbox"/>		Change in Marital Status This Year: Yes <input type="checkbox"/> No <input type="checkbox"/>	
New Clients: Please provide a copy of last year filed Tax return, (All Schedules)			
Would you like printed copies of your Tax Returns or Electronic? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Dependent #1		Dependent #2	
First Name:	Last Name:	First Name:	Last Name:
Date of Birth:		Date of Birth:	
SIN:		SIN:	
Relationship to You:		Relationship to You:	
If child, is he/she under shared custody arrangement? Yes <input type="checkbox"/> No <input type="checkbox"/>		If child, is he/she under shared custody arrangement? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Did they have income this year? Yes <input type="checkbox"/> No <input type="checkbox"/>		Did they have income this year? Yes <input type="checkbox"/> No <input type="checkbox"/>	
If more than 2 dependents, attach separate sheet			



TAX YEAR: _____

Family Head and Spouse - Complete all items in this section & Sign

CANADA REVENUE AGENCY QUESTIONNAIRE AND DECLARATION

	Family Head	Spouse	
Provide information to Elections Canada:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Canadian Citizen:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	
US citizen:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Did you own foreign property or assets with a cost of more than \$100,000CAD at any time in this tax year?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Did you sell a principal residence in the tax year we are preparing?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Are you filing an income tax return with the CRA for the very first time? Yes <input type="checkbox"/> No <input type="checkbox"/>	Are you filing an income tax return with the CRA for the very first time? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Did your province or country of residence change in this tax year? Yes <input type="checkbox"/> No <input type="checkbox"/> Enter the move date and province/country from:	Did your province or country of residence change in this tax year? Yes <input type="checkbox"/> No <input type="checkbox"/> Enter the move date and province/country from:		
Additional Comments or Questions?	Additional Comments or Questions?		
Print name	Print name		
Signature	Signature		



TAX SLIPS AND RECEIPTS - (Please check the boxes that apply.)

- ☐ All information slips such as T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RSP, T4RIF, T5, T10, T5003, T5004, T5006, T5007, T5013, RC210
- ☐ Details of any spousal support or separation payments received
- ☐ Details of any other income, including any tips or gratuities received
- ☐ T2201 Disability Credit Certificate
- ☐ Apprentice and trades people's tool expense receipts
- ☐ Receipts for all RRSP Contributions / Home Buyer's Plan / Lifelong Learning Plan withdrawals / First Time Homebuyer Information
- ☐ Receipts for childcare and summer camp expenses including amounts paid for each child, name of provider and their SIN
- ☐ Adoption expense receipts, Surrogate Medical Receipts
- ☐ Receipts for union and professional dues
- ☐ Receipts for family medical expenses – see Eligible Medical Expenses
- ☐ Receipts for charitable donations
- ☐ Official tax receipt for tuition paid (T2202A)
- ☐ Receipts for interest paid on student loans
- ☐ Receipts for teaching supplies, if you are an eligible educator
- ☐ Receipts for training courses taken – see Canada Training Credit Info @ Canada.ca
- ☐ **New in 2023!! Were you renting in this tax year?** Provide # of month's renting, rent amount paid for the year and Landlord's name. (Please see criteria, in BC tax Credits, Maximum \$400.00 refundable tax credit)

BUSINESS, RENTAL & CAPITAL GAINS INCOME - (Please check the boxes that apply.)

- ☐ **BUSINESS INCOME** – Information to complete an income statement for all unincorporated business ventures including information on revenue, expenses and allocation of income among partners – please identify capital assets purchased.
Please provide us with your GST Business Number if applicable
- ☐ **RENTAL INCOME** – Details of any rental income earned and related expenses
- ☐ **CAPITAL GAINS** – Details on dispositions of all capital property including cost of properties, proceeds, and year of purchase (i.e. shares, mutual funds, bonds, cryptocurrency, all real estate properties including principal residence)



EXPENSES & OTHER SCHEDULES- (Please check the boxes that apply.)

- ☐ T2200 - Declaration of Conditions of Employment completed and signed by your employer.
- ☐ Details of deductible expenses including home office expenses, expenses incurred to earn commission income, and travel expenses.
- ☐ Automobile expenses including cost of vehicle, lease costs, fuel, repairs, registration, washes, insurance, parking, auto club, and loan interest. Please indicate total km's driven and business km's driven for the year.
- ☐ Home office expenses including rent, home insurance, property taxes, mortgage interest, home utilities, maintenance, internet and telephone etc. Percentage of the home that home office occupies?
- ☐ Details of interest paid on all loans for investment purposes.
- ☐ Details of all moving expenses, if you moved more than 40 KM closer to work.
- ☐ Details of alimony or separation payments made including the name, address, and SIN of the recipient and a copy of the agreement if it changed during the year.

OTHER IMPORTANT TAX INFO & SPECIAL PROVINCIAL TAX CREDIT!!!

Manage Online Mail – You can now register for Online Mail with the CRA and have Notices of Assessment and other CRA correspondence delivered to your email via My Account.

Direct Deposit – The CRA is switching to direct deposit payments. If you have not already set up direct deposit for your account, you can do so via My Account or provide our office with direct deposit information

Sale of Principal Residence – Starting in 2016, individuals must report all principal residence dispositions on their tax returns. The gain exemption will only apply if the sale is designated in your tax return – the penalty for not reporting the sale is equal to the lesser of \$100/month that the designation is late and \$8,000.

Tuition, Education and Textbook Credits – The federal education and textbook amounts have been eliminated for 2017 and future years. The federal tuition tax credit is still available. Any unused credit from previous years can be carried forward.