



TAX4U INC.
+1-905-234-0214

PERSONAL TAX PACKAGE

CONTENTS

CHECKLIST	2
ABOUT YOU	3
FOREIGN ASSETS	6
INCOME	7
DEDUCTIONS AND CREDITS	9
PAYMENTS	11
EMPLOYMENT EXPENSES (MUST HAVE FORM T2200)	11
GST/HST	12
EMPLOYMENT/SELF EMPLOYMENT EXPENSES.....	12

IF YOU COLLECTED COVID 19 EMERGENCY SUPPORT FUNDS IN 2022 – YOU MUST COMPLETE PAGE 4

SUBMITTING DOCUMENTATION ELECTRONICALLY

- Kindly send all documents via email: RAITAX4U@GMAIL.COM

SUBMISSION DEADLINES

- **April 30th** – Tax Return for Individuals
- **June 15th** – Tax Return for Self-Employed

Unit 205, 7956 Torbram Road, Brampton, ON L6T 5A2

CHECKLIST

Your Name

Tax Year

TO ASSIST IN THE PREPARATION OF YOUR TAX RETURN PLEASE COMPLETE THIS FORM AND ATTACH THE SUPPORTING DOCUMENTATION. WE CANNOT BEGIN PROCESSING YOUR RETURN UNTIL WE HAVE ALL REQUIRED INFORMATION.

PLEASE KEEP YOUR RECORDS FOR SIX YEARS FROM THE END OF THE TAXATION YEAR TO WHICH THEY RELATE.

- Fill in section about you/your family (pages)
- Answer the foreign asset questions (page)
- Include slips for all DOCUMENTED income

Employment/self-employment

- T4 – Employment income
- T4A – Self-employment, scholarship, grants
- T1204 – Government services contract payments
- T5018 – Contract payments

Retirement

- T4A – Pension, annuities
- T4A (OAS) – Old Age Security
- T4A (P) – Canada Pension Plan
- T4A-RCA – RCA income
- T4RSP - RRSP income
- T4RIF – RRIF income
- Form SSA-109910425 – US Social Security

Investments

- T3 – Mutual funds, REITS, ETFs
- T5 – Investment income, royalties
- T5013 – Partnership income
- T5008 or detailed gain/loss report from broker (securities transactions)

Government benefits

- T4E -EI and maternity, parental leave benefits
- T5007 - Worker's compensation, social assistance
- T4A – Scholarships, grants

List all NON-DOCUMENTED income (pages)

- Self-employment
- Tips
- Foreign income/pensions
- Interest
- Investment gains/losses
- Rental property/sale of your home
- Child/spousal payments received

Provide information about payments (pages)

- Tax installments
- Home Buyer's repayments
- RRSPs
- Child/spousal support paid

Include receipts/documentation supporting deductions/credits

- Adoption expenses
- Charitable donations
- Childcare expenses
- Fees paid to the financial advisor
- Disability Tax Credit Certificate (form T2201)
- Employment expenses (forms T2200, GST370)
- Home accessibility improvements (seniors, those eligible for the disability tax credit)
- Interest paid to earn investment income
- Legal fees to collect salary/wages /child support
- Medical/dental/attendant care expenses
- Moving expenses
- Political contributions
- Public transit passes (seniors only)
- Rent/property tax

- RRSP contributions (Mar-Dec 2020, Jan-Feb 2021)
- Spousal support
- Student loan interest statement
- Teaching supplies purchased by teachers/ECEs
- Tuition (form T2202 or TL11A)
- Union/professional dues (not a T4)
- Other deductions (Carrying charges, Interest)
- Renovations for Seniors 65+

Provide employment/self-employment information (pages)

- Employment expense section (must have form T2200)
- GST/HST section
- Expense lists

- Authorization Request Signature Page (new clients only)

- Your previous year's tax return (new clients only)
- Spouse's tax return, if not prepared by our office
- Void cheque/ direct deposit information, in not on file
- Foreign tax return or tax slips, if taxes paid in another country
- Your GST/HST returns, if not prepared by our office
- Foreign securities report

If we do your bookkeeping, submit Jan – Dec 2021

- Business bank statements (attached canceled cheques, but no receipts)
- Business credit card statements (but no receipts)
- Investment statements
- Cash receipts

ABOUT YOU

FOR NEW CLIENTS, RETURNING CLIENTS, PLEASE NOTE ANY CHANGES.

Name

Date of Birth

SIN

E-mail

Address

City

Province

Postal Code

Primary phone number

Occupation

COVID 19 EMERGENCY FUND RELIEF FUNDS

Did you receive CERB	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			
Did you receive CRB	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			
Did you receive CRCB	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			
Did you receive CRSB	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			
Did you receive CESB	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			
Did you receive CEBA	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			
Did you receive EI	<input type="checkbox"/> Yes <input type="checkbox"/> No	Amount collected	Amount re-paid
Time periods collected			

INFORMATION FOR OUR OFFICE

How would you like to receive the client copy of your return?

- PDF via secure portal (recommended)
- Emailed copy
- Printed copy

Notes, clarifications, questions

INFORMATION FOR CANADA REVENUE AGENCY

I am a Canadian citizen and I authorize Canada Revenue Agency (CRA) to give my name, address, DOB and citizenship to Elections Canada to update the National Register of Electors

Yes No

I authorize registration with CRA's online mail service

Yes No Already registered

I authorize the office of Tax4U Inc. to access CRA's website to check my information on file

*** New clients: please complete, sign and return the Authorization Request Signature Page, authorizing our office as your representative for income tax matters

Yes No

DIRECT DEPOSIT INFORMATION (NEW/UPDATED INFORMATION ONLY)

My bank account information is on file with CRA

I am attaching a void cheque (recommended)

Account information follows:

TRANSIT # (5 DIGITS)	INSTITUTION # (3 DIGITS)	ACCOUNT # (UP TO 12 DIGITS)

FOREIGN ASSETS

During 2021, did you hold bank accounts, investments, investment real estate, or other assets outside Canada which originally cost in excess of \$100,000 CDN (aggregate)?

Note: this includes shares of foreign corporations (e.g. Apple, Microsoft) held in Canadian investment accounts, but NOT Canadian mutual funds that hold US securities.

Yes No Not sure - please contact me

*** If yes, you must file [form T1135](#). Late filing penalties (up to \$2,500) are strictly enforced by CRA.

I would like your office to submit the T1135 form on my behalf with the tax return

I am submitting a foreign securities report from my broker/financial institution

INCOME

DOCUMENTED INCOME

INCOME FOR WHICH OFFICIAL TAX SLIPS WERE RECEIVED (E.G. T4s, T4As, ETC.)

Include income from employment, investments, retirement, etc. See checklist on page 2 – 3, and submit all slips received.

NON-DOCUMENTED INCOME

INCOME FOR WHICH NO OFFICIAL TAX SLIPS WERE RECEIVED.

Includes self-employment, per diems, tips, foreign income/pensions, interest, etc. Attach additional sheets as needed.

PAYOR	INCOME TYPE	EARNINGS	INCLUDES HST (Y, N, N/A)

CAPITAL GAINS/LOSSES

I sold non-registered stocks/bonds/mutual fund shares/real estate in 2022 Yes No

If yes, I am submitting:

- A detailed gain/loss report from my broker
- Form/s T5008 (cost basis must be indicated)
- A sheet listing ALL of the following:
 - What was sold – stocks, bonds, mutual fund shares, real estate, etc
 - Details of the sale – date, number of shares sold (if applicable), proceeds, commission paid
 - Details of the asset purchase – original cost; purchase date

SALE/CHANGE OF USE OF A PRINCIPAL RESIDENCE

TO CLAIM THE PRINCIPAL RESIDENCE EXEMPTION, YOU MUST REPORT THE SALE /DEEMED SALE OF YOUR HOME.

I sold / converted use of my principal residence in 2022 Yes No

If yes:

Year acquired Sale price/fair market value \$

Percentage you own: %

Address

City

Province

Postal Code

This property was my principal residence for all the years owned Yes No

RENTAL PROPERTY

IF YOU OWN RENTAL PROPERTIES, ATTACH THE FOLLOWING COPIES:

- Monthly bank statements
- Property purchase agreement
- Property sale agreement
- Statement of adjustments & trust ledger statement
- Completed rental income and expenses spreadsheet

Address (if different from home address)

City

Province

Postal Code

Rent received \$

of Units

Personal use %

Short – term rental (e.g. Airbnb, vacation)

Co-owner/s

SIN/s

Percentage owned %

Advertising	\$		Property taxes	\$	
Insurance	\$		Auto and travel	\$	
Mortgage interest	\$		Utilities (hydro/gas/etc.)	\$	
Management and administration	\$		Other - specify:	\$	
Maintenance/repairs (general)	\$		Maintenance/repairs (on rental unit only)	\$	
Purchases and improvements (appliance purchases, renovations, etc.) - list items and costs:					

Property was sold (or converted to personal use) in 2022 If yes: Yes No

If yes:

Sale price/fair market value \$

Purchase price (including purchase costs) \$

List outlays /expenses (closing costs, real estate commission, etc.) and additions
/improvements not yet claimed (renovations, new furnace, etc.) Include dates and costs:

SUPPORT RECEIVED

Child support \$

Spousal support \$

Agreement is: pre '97 post '97

Received from:

DEDUCTIONS AND CREDITS

SUBMIT RECEIPTS/SUPPORTING DOCUMENTATION

- Adoption expenses
- Charitable donations
- Childcare expenses
- Fees paid to financial advisors (non-registered investments only)
- Disability tax credit (form T2201)

- Foreign taxes paid (include foreign tax return and / or tax slips indicating final tax liability)
- Home accessibility improvements (seniors and those eligible for the disability tax credit)
- Interest paid to earn investment income (non-registered investments only)
- Legal fees to collect salary/wages/child support (include receipt(s))
- Medical/dental/attendant care expenses
- Moving expenses (moves of at least 40KM for a new job or business, or to attend post-secondary school)
- Political contributions
- Public transit (seniors only)
- RRSP contributions (Mar-Dec 2021 and Jan-Feb 2022)
- Student loan interest
- Teaching supplies purchases by teachers / ECEs
- Tuition (form T2202A or TL11A)
- Union/professional dues (not on a T4)
- Digital news subscription expenses

FIRST TIME HOME BUYERS' TAX CREDIT

Address of property

Acquisition date

Co-owner/s of the property, if applicable

ONTARIO TRILLIUM BENEFIT (RENT/PROPERTY TAX CREDIT)

NOTE: One partner/spouse must claim full amount. Seniors may qualify for the Ontario Senior Tax Credit.

ONTARIO ADDRESS	RENT/PROPERTY TAXES PAID	# MONTHS	PAID TO

- I am submitting receipts for rent and/or property taxes paid (recommended)

PAYMENTS

INSTALLMENTS

Total personal tax installments paid directly to CRA (NOT taxes withheld on slips) for 2022 tax year

HOME BUYERS' RRSP REPAYMENT

Year withdrawn Amount withdrawn \$

Amount paid back in 2022 \$

SUPPORT PAID

Child support \$ Spousal support \$ Agreement is:

pre '97 post '97 Paid to :

EMPLOYMENT EXPENSES (MUST HAVE FORM T2200)

I worked from home in 2021 due to COVID-19 Yes No Number of days

I am T4 employee eligible to claim employment expenses Yes No

If yes:

I am submitting form T2200 (Declaration of Conditions of Employment) form/s signed by my employer

I am submitting form GST370 (Employee and Partner GST/HST Rebate Application) form signed by employer

I have listed all employment expenses in the tables on page 10 (note: expenses must fall within categories listed on forms T2200/GST370)

GST/HST

ANNUAL FILERS WHO OWE AT LEAST \$3,000 IN GST/HST MUST REMIT QUARTERLY INSTALMENTS; OTHERWISE, CRA WILL CHARGE INSTALLMENT INTEREST BASED ON THE EXPECTED QUARTERLY PAYMENT DUE DATES.

Are you registered for GST/HST Yes No

Please file my GST/HST return (charge applicable) Yes No (submit most recent return/s filed)

If yes:

Annual filer Quaterly filer

GST/HST Number

GST/HST collected \$

GST/HST installments paid for 2022

Did you work outside Ontario in 2022? Yes No

EMPLOYMENT/SELF EMPLOYMENT EXPENSES

IF OUR OFFICE DOES YOUR BOOKKEEPING, LEAVE THIS SECTION BLANK AND REFER TO THE CHECKLIST ON PAGE 2 AND 3 FOR A LIST OF DOCUMENTATION TO SUBMIT.

AUTOMOBILE

BEST PRACTICE IS TO MAINTAIN A MILEAGE LOG FOR BUSINESS-RELATED DRIVING

Make

Model

Year

Total distance driven during year

Distance driven for business

Cost if bought during year (including GST/HST) \$

Date vehicle purchased / leased

- Copy of vehicle purchase agreement
- Copy of vehicle lease agreement

AUTO EXPENSES	FULL AMOUNT PAID - INCLUDE GST/HST; DO NOT PRO-RATE
Gas and oil	\$
Car loan interest	\$
Insurance	\$
License and registration	\$
Maintenance and repairs	\$
Lease payments	\$
Other – specify:	\$
Business parking	\$

BUSINESS USE-OF-HOME

Percentage of home office used for business purpose % [Click or tap here to enter text.](#)

HOME EXPENSES	FULL AMOUNT PAID - INCLUDE GST/HST; DO NOT PRO-RATE
Heat	\$
Electricity	\$
Insurance	\$
Maintenance and repairs	\$
Mortgage (annual interest portion only)	\$
Property Taxes	\$
Rent (total for year)	\$
Municipal Utilities (water, garbage, etc.)	\$
Other – specify:	\$

TAX4U INC.
+1-905-234-0214

Headshots, demo reels, self-tapes, etc.	\$	
Professional services	\$	
Health insurance premiums	\$	
Equipment - list:	\$	
Total	\$	