

RKG TAX & ACCOUNTING INC.

CHARTERED PROFESSIONAL ACCOUNTANT

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Personal Tax Information / Checklist

Taxation Year :

To guarantee that your return will be prepared by April 30, we must have all your data by April 16th

Identification:

DD-MMM-YYYY

Your Name:		Your SIN		Your Birth Date:	
Spouse Name:		Sps. SIN		Spouse Birth Date:	
Address		Your Phone #			
		Spouse Phone #			
Your E-Mail		Spouse Email			

Marital Status:

☐ Married ☐ Widowed ☐ Divorced ☐ Common-Law* ☐ Separated ☐ Single

Did your marital status change during the year? ☐ Yes ☐ No If so, provide the date

If we are **NOT** preparing a tax return for your spouse, please provide the following:

Net Income figure from line 23600 on page 2 of his/her 2023 tax return

* Includes same-sex relationships

Dependents:

List any **dependents** who were 18 years of age or under as of December 31, 2023

Name	Relationship	2023 Net Income	Date of Birth	SIN

Do you or your spouse or any of your dependents qualify for disability credit?

Do you provide shelter and/or financial support to any other relatives (parents)? ☐ Yes ☐ No

Other Important Information & Delivery of Return:

Do you want to file your return electronically?	Yes	No
Did you own/hold foreign property with a cost of more than \$100,000? (Attach details if Yes)	Yes	No
Do you authorize CRA to provide information about you to Elections Canada?	Yes	No
Do you want your tax refund deposited Directly to your bank account? (Attach void cheque if yes)	Yes	No
Are you Canadian Citizen?	Yes	No
Has Your last name changed?	Yes	No
Did you sell a home in taxation year and want to claim the principal residence exemption?	Yes	No
are you filing for the first time in taxation year?	Yes	No

Rental Property

If property was purchased during the year, provide the agreement of purchase and sale as well as the solicitor's reporting letter.

Address		Name of Partner and Their % Owned	
		SIN of Partner	
		Income	
Management and Administration		Advertising	
		Mortgage Interest	
Repairs & Maintenance		Property Tax	
		Professional Fees	
Insurance		Utilities	
		Other	
If Other Specify			
Major renovations and Purchases		Specify	
Major renovations and Purchases		Specify	

Sale of Real Estate (INCLUDING Principal Residence)

Provide the agreement of purchase and sale as well as the solicitor's reporting letter for BOTH your sale and purchase

Address		Sale Date		Legal and Other Costs on Sale	
		Sale Price		Commission Paid on Sale	
Name of Partner and Their % Owned		SIN of Partner			
Purchase Date		Purchase Price		Legal/Other Costs on Purchase	
Additions/other major improvements		Specify			
Additions/other major improvements		Specify			
Other		Specify			
☐ Check this box if this was your principal residence and you have acquired a new principal residence					

Sale of Securities (In non-RRSP or other registered plan)

For each brokerage account, please provide the following:

- Transaction Summary for the Year
- Investment Income and Expense Summary for the Year
- The December 31st monthly account statement

For **ALL** non-RRSP mutual funds, please provide the December 31st year-end statements. (These statements should show all mutual fund transactions for the year, including any sales, redemptions or transfers).

Employment Expenses

Include a T2200 - Declaration of Employment Conditions from your employer.

Accounting/Legal Fees		Lodging		Telephone		Supplies (Postage, etc...)	
Meals/Entertainment		Parking		Other		Specify	

Automobile Expenses

For business and employment

Year and Make of Automobile		Year of Purchase		Purchase Amount	
Total Kilometers Driven in Year		Total Kilometers Driven in Year for Business			

If car was purchased or leased in 2023, provide a copy of the purchase or lease agreement

Fuel		Insurance		Payments		Licensing and Registration	
Tolls		Car Washes		Loan Interest		Repairs and Maintenance	
Other		Specify		Other		Specify	

Home Office -

For Business and Employment

Percentage of Home Used for Business		Telephone		Hydro		Rent	
Mortgage Interest (Self-Employed Only)		Property Taxes		Heat		Water	
Maintenance and Repairs		Internet		Other		Specify	

Home Office - Covid Benefit

- Are you working from home due to COVID Restrictions?
☐ Yes
- Claim Simple Method (\$2 per day, \$400 for 2020 and \$500 for 2021 and 2022 MAX)?
☐ Yes
- Use Detailed Method (must provided detailed expenses)
☐ Yes

Self-Employed Income and Expenses

Business Name		Type of Business			
Name of Partner		SIN		Percent Owned By Partner	
Licenses, Dues, Memberships, Subscriptions		Internet Fees		Office Supplies	
Repairs and Maintenance		Advertising		Salaries	
Meals and Entertainment		Insurance		Legal/Accounting	
Interest and Bank Charges		Rent		Telephone	
Other		Specify			
Other		Specify			

Please Include GST/HST In All of The Above Amounts

Sources of Income

Check if you have any of the following sources of income

Source	Slip
☐ Employment Income	T4
☐ Taxable Disability Income	T4A
☐ Profit Sharing Income	T4PS
☐ Commission Income	T4 or T4A
☐ Old Age Security	T4A (OAS)
☐ Canada Pension	T4A (P)
☐ Other Pension/Annuities	T4A
☐ RRIF Income	T4 (RIF)
☐ Withdrawals from RRSP	T4 (RSP)
☐ Employment Insurance Benefits	T4 (E)
☐ Workers Safety Insurance	T5007
☐ Social Assistance Payments	T5007
☐ Scholarships and Bursaries	T4A
☐ Dividends	T3 or T5
☐ Interest	T3 or T5
☐ Limited Partnerships	T5013
☐ Universal Child Care Benefits	RC62
☐ Working Income Tax Benefit Advance	RC210
☐ Alimony	Amount
☐ Child Support (Taxable)	Amount
☐ Tips and Gratuities	Amount
☐ Other	Amount
☐ Other	Amount

If you have any other income and/or deductions that are not listed above, please itemize below and attach supporting receipts.

Deductions and Tax Credits Available

Check if you have any of the following deductions and **INCLUDE ORIGINAL RECEIPTS** in all cases.

☐ Investment Loan Interest	Amount
☐ Student Loan Interest	Amount
☐ Investment Counselling Fees	Amount
☐ RRSP Contributions	Amount
☐ Moving Expenses (If more than 40km)	Amount
☐ Medical Expenses	Amount
☐ Adoption Expenses	Amount
☐ Health Insurance Premiums	Amount
☐ Union Dues and Professional Fees	Amount
☐ Child Care Expenses	Amount
☐ Charitable Donations	Amount
1 st Time Donor?	
☐ Transit Passes	Amount
☐ Political Party Contributions -	Amount
☐ Labour-Sponsored Funds	Amount
☐ Tuition Fees - SPOUSE/CHILDREN	Amount
☐ Tax Installments paid to government	Amount
☐ Alimony Payments Made	Amount
☐ Child Support (ONLY if deductible)	Amount
☐ Rent Paid	Amount
☐ Property Taxes Paid	Amount
☐ Firefighter / Search & Rescue Credit	Amount

PLEASE PROVIDE YOUR 2022 NOTICE OF ASSESSMENT

Other Information

Did you make tax installment payments during the year?	Yes	No
Did you participate in Home Buyers Plan?	Yes	No
Did you participate in the Lifelong Learning Plan?	Yes	No
Is your child transferring post-secondary tuition amount to you? if yes, please provide copy of signed T2202A slip	Yes	No
Are you including your last year's Notice of Assessment?	Yes	No
New Clients - are you including your last year's tax return schedules	Yes	No

Please note, no items will be included onto your tax return without the proper documentation. In the event of an audit, the onus of proof is on the taxpayer.

Signature :

Date :