Client name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Additional family members \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

For us to file your personal tax return for any given year, each taxpayer for whom we are filing must provide us with a signed electronic filing form for the respective year. This form is available on our website [www.mikeholloway.ca](http://www.mikeholloway.ca).

Please provide all of the following documents, if applicable, for the respective tax year.

Income:

* All tax slips [T3, T4, T4A (including: OAS & CPP), T4E, T5, T4RSP, T4RIF, T5008, T5013]
* Support for any other sources of income
* Declaration of Conditions of Employment/ Declaration of Conditions of Employment for Working at Home - Must be supported by Form T2200 (signed by your employer) (if applicable)
* Realized gain/loss report on investments.
* Totals for foreign pension income, indicating any foreign taxes paid on this income, including T1135 Foreign property income.
* Alimony or child support received.
* Self employment income and expenses *[see below]*
* Rental income and expenses *[see below]*

Deductions & credits:

* Tuition fees [must be supported by Form T2202A (Issued by College/University) ]
* Student loan interest paid.
* Union dues and professional fees
* Investment management fees
* Investment loan interest paid.
* Employment expenses [must be supported by a T2200 from your employer]
* RRSP contribution receipts
* Home buyer plan and lifelong learning plan withdrawals or repayments
* Property tax or rent paid.
* Childcare expenses with receipts
* Adoption expenses with supporting documentation
* Total cost of using public transit service [must be 65 years or older to be eligible]
* Charitable and political donation receipts
* Medical and dental receipts and/or summaries for the year.
* Tax instalment payments

If you are self-employed, please provide a spreadsheet or financial statements with your business financial information for the year or use the forms on our website. The details to be provided include:

* Total self-employment income earned.
* Total business expenses by category
	+ Business expenses
	+ Vehicle expenses
		- The vehicle you are currently driving [make, model & year]
		- Approximate purchase price of the vehicle and approximate date of purchase
	+ Home expenses for business purposes
* Your GST HST business number if you are registered and copies of your GST HST returns for the year if they are already filed.

**Checklist Page 2**

If you have a rental property, please complete the Rental Schedule form on our website including the following:

* The full address of your rental property
* Total rental income earned.
* Total rental expenses by category
* Details regarding the ownership of the property including percentage ownership.

**Other Important Information/Updates**:

* If you gave birth to a child or adopted a child, please provide their full name and date of birth.

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gender \_\_\_\_\_\_

* If you purchased a home, please provide the full address and date of purchase.

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purchase Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Check box if this is your primary residence:

* If you moved to a new home, please provide the full address and date of move.

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Move Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Check box if this is your primary residence:

If you moved for work purposes, please notify us and contact us for further information.

* If you sold a property during the year, please provide the details relating to the sale [this includes principal residence and rental properties] \*Please use the form on our website “Analysis of property sale.” for information required.
* If you lost a family member for whom you are the executor, please notify us of the date of death and we will follow up with additional requests as needed.

**Name of Deceased \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Death \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* If your marital status changed during the year, please notify us of the date of the change.

[i.e., married, common-law\*, separated, divorced, widowed]

\*You are considered common-law when you have been living with an individual for one year

Change of Marital Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**First time clients**, please provide the following:

* A copy of your tax return for the last tax year that was filed.
* A copy of your notice of assessment for the last tax year that was filed.
* Accounting fee incurred to file your last tax return.

We will follow up with additional questions/requests as needed.