

2. Residence

Province or territory of residence on December 31, 2021: _____

Did you immigrate to Canada or emigrate from Canada during the year? Yes No

If yes, provide date of entry into Canada _____ or date of departure _____

3. Elections Canada

Are you a Canadian Citizen? Yes No

If yes, do you authorize CRA to provide information to Elections Canada to update the National Register of Electors. Yes No

4. Foreign Reporting – T1135

Did the taxpayer own or hold foreign investment property with a total cost of more than CDN \$100,000 at any time during the year? Yes No

5. Dependants

A dependent is someone related to you who is dependent on you for support at some time in the year.

Name	Relationship	Date of Birth	SIN	Physical or Mental Impairment?	Income

Ensure that you provide ALL information slips with your return. The process the Canada Revenue Agency (CRA) uses to match information slips to tax returns is very accurate. In certain circumstances, you can be penalized for unreported income at up to 20% of the unreported amounts.

6. General Income/Deduction

- T4 slips – Employment income? Yes No
- T4A – Other income (i.e. Covid Subsidies) Yes No
- T4E – Employment Insurance? Yes No
- T5007 – Social assistance? Yes No
- Employment income or taxable benefits not shown on T4 slip? Yes No
- Dollar amount of gratuities and tips? Yes No
- Amount paid for union and professional dues and organization names? Yes No
- Receipts for child care expenses, with receipts, for each child? Yes No
- Receipts for moving expenses paid in the year? Yes No
- Receipts for support payments made or received? Yes No
- Receipts for Home office expenses due to Covid-19? Yes No
- Detailed Method (T2200S) Yes No
- Temporary Flat Rate Method (# of days worked from Home) _____ days
- Receipts for deductible employment expenses (T2200)? Yes No
- Is a signed form T2200 attached? Yes No

7. Pension Income

- T4A – Pension, retirement, and annuity income? Yes No
- T4AP – Canada pension plan benefits? Yes No
- T4A (OAS) – Old Age Security pension slip/foreign pensions? Yes No
- T4A (RCA) – Retirement compensation arrangements? Yes No
- T4RSP – Registered retirement savings plan withdrawal? Yes No
- T4 RIF – Registered retirement income fund withdrawal? Yes No
- Do you elect to split eligible pension income with your spouse or common-law partner? Yes No

8. Investment Income/Deductions

- T3 – Income from trust allocations? Yes No
- T5 – Investment income? Yes No
- T4PS – Income from profit sharing plans? Yes No
- T5013 – Partnership income? Yes No
- T5008 – Income from securities transactions? Yes No

Did you dispose of property? If so, provide details on the sale such as documents to support the selling price, purchase price, and any additional costs such as major renovations.

Did you dispose of investments? If so, provide capital gain summary from Broker.

Interest paid to earn income \$ _____

Management fees paid \$ _____

Accounting/legal fees paid \$ _____

9. Self-Employment/Business Income

- Financial statement(s)/schedule of revenue and expenses attached? (see attachment for schedule) Yes No
- Are you GST registered? GST# _____ Yes No
- If yes, is MBA CPA Inc. to file your GST return? Yes No
- Have you registered to be eligible for Employment Insurance Special Benefit? (maternity, parental, and sickness coverage) Yes No
- Have you registered for WCB personal option protection? (coverage for self-employed individuals) Yes No
- Is there a list of all asset additions and disposals? (including cars, equipment, etc.) Yes No

10. Rental Income

- If you owned rental property, is a statement of rental income attached? (see attachment for schedule) Yes No

11. RRSP/PRPP Contributions

- T-slip for contributions made attached? Yes No
- Were any amounts repaid during the year to a home buyer's plan or a lifelong learning plan? Yes No

12. Other Credits

- T2202A – Tuition amount for yourself? Yes No
- T2202A – Tuition amount claimed on transfer from dependent? Yes No
- Receipt or amount for taxpayer's student loan interest? Yes No
- Withdrawals or repayments under Home Buerys' Plan or Lifelong Learning Plan? Yes No
- Receipts/listing of all medical expenses paid in the year for yourself, spouse, and dependents? Yes No
- Receipts for Attendant care expenses? Yes No
- Receipts for political contributions? Yes No
- Receipts or contributions for registered charities? Yes No
- Digital News Subscription expenses (receipts/details)? Yes No
- Statement for new home to claim the home buyer's amount? Yes No
- Eligible educator's school supplies expenses? Yes No

13. Prior Year Tax Return Information/Correspondence

- If new to our firm, are tax returns (and corresponding Notices of Assessment) for the last three years attached? Yes No
- If you would like your tax refund deposited directly into your account, is a void cheque attached? Yes No

