



**Please provide us with the following information for your personal taxes**

This list is not comprehensive; it is to be used as a guideline.

**Employment income**

- A copy of your current year tax information slips (T4, T5, T4a, T3, T2200, T2202(A) etc.)
- Prior year notice of assessment or any reassessments received from the CRA
- RRSP receipts
- Medical expenses including premiums paid personally, dental, drugs and glasses
- Public transit passes
- Child care expense receipts, children fitness activities
- Charitable donation receipts
- Any other source of income support
- Union or professional dues paid
- Disability tax credit details
- Moving expenses( if moved for employment purposes over 40km away)
- Alimony payments
- Other (interest on student loans, caregiver details, adoption)

If we are not preparing a return for your spouse, please provide the net income figure from line 236 on page 2 of his or her tax return: Spouse's net income

List any dependents who were 18 or under as of December 31 of current year  
(Name Relationship Income Birth date)

- See Next page for Self Employment and other income

## **Self-Employed Income & Expenses Employment Expenses**

Name of Business

Type of Business

### **REVENUE**

- Business Income

### **COST OF SALES**

- Purchases/Direct Costs for business

### **EXPENSES**

- Accounting, legal fees
- Advertising, promotion
- Meals/entertainment
- Lodging
- Parking
- Office Supplies
- Telephone
- Licenses, dues, fees
- Insurance
- Interest/bank charges
- Meals/entertainment
- Rent
- Salaries
- Other Expenses paid to generate income
- Automobile SEE BELOW
- Home Office SEE BELOW

### **Personal automobile used for business purposes**

- Total KM driven in current year
- Total KM driven for business purposes
- If purchased: date purchased and amount
- Fuel
- Repairs
- Insurance
- Registration
- Finance Interest
- Lease payments (monthly) and details of lease start date, value, end date
- Other

**Home Office Expense**

- Business or Employment Use %  
(percentage of house used for business or employment)
- Utilities
- Insurance
- Maintenance, repairs
- Mortgage Interest/Rent paid
- Other expenses
- Property taxes
- Other

If claiming employment expenses as an employee/sales person or commissioned employee.

Please ensure that you have a signed T2200 Declaration of Employment Conditions from your employer available.

**Rental Property Income Sale of Real Estate & Expenses** (excluding personal residence)

- Address
- Jt. Ownership %
- Income (rent collected)
- Date Purchased and Date Sold if applicable
- Amount purchased for and amount sold for

**Expenses**

- Advertising
- Insurance
- Mortgage Interest
- Purchase price
- Repairs
- Property Taxes
- Salaries
- Utilities

**Sale of Non-RRSP Stock** (please provide broker's receipts for both the purchase and the sale)

- Name of Stock
- Date and Purchase amount
- Number of shares purchased
- Date Sold and sale amount
- Number of shares sold
- Commissions

Should you have any questions or would like to discuss your options please contact us

Henderson Campeau LLP

