

Personal Tax Information

INTEGRITY ACCOUNTING SERVICES INC.

Name _____ Cell Ph _____

Address _____

Email _____ Dependents _____ Info on Back(name, DOB)

SIN _____ Marital Status _____

Birth date _____ Telephone _____

Income

NOTICE OF ASSESSMENT

PROPERTY TAX/RENT -

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Personal

- T4 - Employment income
- Tips and gratuities
- T4A (OAS) – Old Age Security benefits
- T4A (P) – Canada Pension Plan benefits
- T4A – Pension and other income
- T4E – Employment Insurance benefits
- T5007 – WCB or Social Assistance benefits
- T4 RSP – RRSP income
- T4 RIF – RIF income
- RC 62 – Universal Child Care benefit
- T3 – Mutual Fund and Other Trusts

Investment

- T5/T3 – Interest and Dividend income
- T600 – Canada Savings Bonds
- T5008 – Statement of Security Transactions
- T5013 – Limited Partnership income
- Rental income and expenses (use checklist)
- Capital gains or losses (stocks, bonds, mutual funds, etc.)
(Brokers statements / trading slips including cost and sale details)
- Disposition of real estate (cost and proceeds of sale)
- Borrow money to earn investment income
- Foreign interest or dividends
- Royalty or other investment income

Other

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Business income and expenses (use checklist) <input type="checkbox"/> Alimony received (include name & SIN of payer) <input type="checkbox"/> Taxable child support (include name & SIN of payer) | <ul style="list-style-type: none"> <input type="checkbox"/> RRSP withdrawals <input type="checkbox"/> Scholarships / bursaries <input type="checkbox"/> Foreign income and taxes paid |
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Deductions & Tax Credits

- RRSP contribution receipts
- Union or professional association dues
- Alimony paid (include name & SIN of recipient)
- Property Tax/Rent
- Safety deposit box charges
- Interest paid on monies borrowed for investments
- Investment counsel and accounting fees
- Employment expenses (use checklist - T2200 required)

- Deductible legal fees
- Childcare receipts (includes pre-school fees)
- Eligible moving expenses
- Allowable business investment losses
- Capital loss carry forwards
- Non-capital loss carry forwards
- Limited partnership losses of other years
- Employment insurance benefit repayments

- T2201 – Disability Deduction
- T2202 – Tuition Fees / Education Credit
- T2202 – Tuition Fees transfer from child (form signed)
- Tuition fees over \$100 paid (post secondary)
- Interest paid on student loans
- Monthly public transit passes
- Children's fitness receipts (\$500 max per child)

- Medical/dental/optical expenses (unreimbursed amount)
- Premiums paid to private medical insurance plans
- Adoption expenses
- Attendant care expenses
- Donations to registered charities
- Political contribution receipts
- Parent(s) over 65 or infirm relative live with you