

## Personal Taxes - Information to Provide for Each Year

Please answer No or Yes to the following questions, and provide details where indicated:

1. Have you given us **all** of your tax information slips (such as T3, T4, T4A, T4A(OAS), T4A(P), T4E, T5, T5013, T5018) for the year?  Yes  No, details:
2. Has your address, phone number, or email changed since last filing your personal taxes?  
 No  Yes, details:
3. Has your name, marital status, or dependants changed since last filing your personal taxes?  
 No  Yes, details:
4. At any time during the year, did you own more than \$100,000 of foreign property or investments (directly or via the stock market)?  
 No  Yes, details:
5. Do you pay rent where you live?  No  Yes. If yes, is your family income below \$80,000 per year?  
 No  Yes, please provide rent amount per month, how many months at that address and name of your landlord:

In addition, please **provide any of the following**, which apply to this tax year:

(Please note where CRA Forms are indicated below, links to these forms are provided on our website at [cnk-cpa.ca/Tax Prep](http://cnk-cpa.ca/Tax Prep).)

- ◆ If you had any investments: Your gain/loss report and monthly/annual broker statements (We need to know dividend and interest income, Canada Savings Bond income, return of capital, investment expenses such as interest charges or fees, purchases or sales of investments, and if any of your investments de-listed or became otherwise worthless.)
- ◆ If you sold and/or purchased any real estate: All related legal documents
  - If you moved: Moving expenses (must meet certain criteria)
- ◆ If you paid or received any alimony or child maintenance: Indicate amounts (Even when not included in or deducted from income, CRA requires these amounts be reported.)
- ◆ RRSP contributions and/or withdrawals
- ◆ Annual union or professional dues
- ◆ Tuition fees for yourself or your dependants
- ◆ Medical receipts and details of significant disabilities. If you have a dependant person with disabilities and limited income, you may qualify for deductions, credits, subsidies or benefits.
- ◆ Donation receipts
- ◆ Childcare expenses
- ◆ Income tax instalment payments
- ◆ If you are self-employed:
  - If you sell via the internet, CRA requires you to provide a list of your websites along with the annual revenues for each site.
  - You may be able to claim 100% of the capital cost allowance on zero-emission vehicles. Eligible vehicles must be acquired after March 18, 2019, and become available for use before 2024.
  - Business income
  - Rental income
  - Farm income

If you are claiming employment expenses:

- Employment expenses - CRA form **T777** (see link on our website)