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TAX RETURN CHECKLIST

Please provide:

-Signed authorization form (**NEW CLIENTS ONLY**) -All tax slips received from CRA (ALL CLIENTS) **CURRENT CLIENTS:** Please fill out the information on page 1 **only** if there is a change from last year.

Personal information	Taxpayer A	Taxpayer B (i.e. Spouse or Dependent)	Comments (if any)
1. First Name:		Dependenty	
2. Last Name:			
3. SIN:			
4. Phone Number :			
5a. Date of Birth:			
5b. Date of Death (ifapplicable)			
6. Citizenship:			
 Marital Status on December 31, 2021: (Options: Single, Common Law, Married, Widowed, Separated, Divorced) 			
8. Did your Marital Status change in 2021?			
8a. If answer to #8 is yes, please provide date of change:			
9. Name and birthdate of all dependents under 18 years of age:			
1. NameD.O.B2. NameD.O.B3. NameD.O.B4. NameD.O.B5. NameD.O.B6. NameD.O.B			
10. Do you or anyone in your household qualify for disability tax credit? Please specify			
 11. Did you sell a home in 2020 that was your principal residence? If yes, please provide the following: Year of purchase Address of the property Name and %of ownership all owners 			
-Sale price			
Home Address:			
Mailing Address (If different from home address):			

Income forms Checklist (if applicable)	
Employment (T4/T4A/T4E)	
Pension (T4A/T4OAS/T4AP)	
COVID Benefits (T4A)	Please simply consider if these forms are
Interest/Dividends/Capital Gains (T5/T5013)	applicable to you. If so, please provide the appropriate tax slips with your documents.
Other Investments (T5013)	appropriate tax slips with your documents.
RRSP/RIP (T4RSP/T4RIF)	
Tax Deductions/Credits Checklist (if applicable)	
RRSP Contributions	

Union/Professional Dues Child Care Expenses Tuition Fees (T2202A or TL11A) Disability Certificate (T2201) Student Loan Interest Statement Medical Expenses Charitable Donations Spousal/Child Support Paid Other (if incurred to earn income) Other items (if applicable)

Home Buyers Plan - repayment

Other - please specify:

Please simply consider if these items are applicable to you. If so, please provide the appropriate supporting documentation.

NEW HOME OFFICE EXPENSES

Eligible employees can use one of the following methods to claim expenses.

1. Temporary flat rate method

- You can claim \$2 per day to a maximum of \$500 for all the days worked from home.

- No employer certification is required.
- You must have worked from home in 2021 due to the pandemic
- You worked from home more than 50 per cent of the time for at least four consecutive weeks in that year
- You are claiming home office expenses only and no other employment expenses
- You were not fully reimbursed by your employer for all of your home office expenses

2. Detailed Method

- Eligible employees can choose the detailed method to claim home office expenses.
- To make a claim under this method, you will need to obtain a signed T2200 or T2200S from your employer.
- You worked from home in 2021 due to the pandemic or were required to work at home by your employer
- You were required to pay for expenses related to your home workspace and used the expenses directly in your work

either:

- worked in your home workspace "mainly" (more than 50 per cent of the time) for at least four consecutive weeks, or

- only used your workspace to earn employment income, in particular, for regularly and continually meeting clients, customers or other people while doing your work

3. You must also fill out the form on the next page.

Please advise which method would you like to use.

If using the Temporary Flat Rate Method, please advise how many days you worked from home.

The number of days worked at home due to the pandemic includes both full-time and part-time days but not days off (whether for vacation, illness or another reason).

If using the Detailed Method, please fill out the information on the next page and retain all supporting documents and receipts for seven years.

Home Office Expense			
Description	Amount		
Total house area (square feet)			
Area for business use only (square feet)			
Heat			
Electricity			
Water			
Maintenance			
Home Internet Access Fees			
Property taxes (Commission employees only)			
Home Insurance (Commission employees only)			
Rent			
Please provide the period for which you worked at home			