

PLEASE COMPLETE THE FORM AS APPLICABLE

Section A

IDENTIFICATION

PLEASE CIRCLE Mr. Mrs. Ms. Miss or _____

NAME LAST FIRST INITIAL SOCIAL INSURANCE NUMBER

DATE OF BIRTH (YYYY-MM-DD)

PLEASE CIRCLE Mr. Mrs. Ms. Miss or _____

SPOUSE LAST FIRST INITIAL SOCIAL INSURANCE NUMBER

DATE OF BIRTH (YYYY-MM-DD)

ADDRESS

NUMBER AND STREET APT or UNIT CITY PROV POSTAL CODE

TELEPHONE RESIDENCE BUSINESS E-mail address

MARITAL STATUS: () SINGLE, () MARRIED, () WIDOWED, () DIVORCED, () SEPARATED, () COMMON LAW

If marital status changed during 2016. Please provide change and date _____

DEPENDENTS

Table with columns: NAME, DATE OF BIRTH (YYYY-MM-DD), Son/Daugh Parent, INCOME - IF ANY, SIN NUMBER

Section B

PLEASE ANSWER THE FOLLOWING QUESTIONS

- 1. Do you agree to Canada Revenue Agency providing, your name, address and date of birth to Elections Canada?
2. Did you own any Foreign Property such as stocks, bonds or rental property at any time in 2017 with a total cost of more than \$100,000.00 Canadian?
4. If you are not already receiving your refund by direct deposit, do you wish to have direct deposit of your refund?
5. Do you have self employment income?
6. If Self Employed did you file your HST?
7. Do you have rental income and expenses?
8. Are you able to claim employment expenses?

PLEASE SEE INCOME AND DEDUCTION CHECKLIST ON THE REVERSE AND SUPPLEMENTARY WORK SHEET.

INCOME AND DEDUCTION CHECKLIST

INCOME

Please check where applicable and provide an information slip or supporting documentation.

- Employment Income - T4 Slip
- Other Employment Income. If not a T4 - please provide details
- Pension Income - Old Age, CPP, Reg Pensions incl., US Social security & Foreign Pensions T4A/T4A(OAS)/T4A(P)
- RRSP, RRIF & Annuities - T4RSP/T4RRIF
- Employment Insurance Benefits - T4E
- Alimony and Separation Allowances **received**
Pre May 1997 Agreement Post May 1997 Agreement
Spousal Support \$ Child Support \$
Received from: _____ Social Insurance Number _____
- Rental Income and Expenses - Please provide details on the Work Sheet**
- Investment Income - Dividends from Canadian and Foreign Corporations - T5's etc.
- Interest Income (GIC, Bonds & Mortgages) - T5
- Estate & Trust Income including from Trust Units and REITS - T3
- Other Investment Income not listed such as flow through shares
- Capital Gain or Loss Transactions - Please provide Trading slips and Brokers statements as well as the cost of the sold securities. Include any Mutual Fund sales **outside** your RRSP/RRIF accounts.
- Self-Employment Income - Please provide a detailed listing of Income and Expenses**
- Workers Safety Insurance Board and Social Assistance payments - T5007
- Universal Child Care Benefit - RC62
- Other Income not listed - Please provide details

DEDUCTIONS AND CREDITS

Please check where applicable and provide an information slip, receipt or other supporting documentation.

- Adoption expenses (Please call our office for details)
- Alimony and Child support payments. Please check
Pre May 1997 Agreement Post May 1997 Agreement
Spousal Support \$ Child Support \$
Paid to: _____ Social Insurance Number _____
- Annual Union and Professional Dues Receipts
- Caregiver Credit information - Please provide name, birth date & net income of your qualified dependent
- Carrying Charges - Investment loan interest expense, Safe deposit box and accounting fees
- Charitable Contributions and Federal and Provincial Political donations receipts
- Child Care & Child Fitness & Arts Receipts
- Disability Claim - **T2201 required for first time claimants**
- Limited Partnerships & other Tax Shelter receipts.
- Medical Receipts Including personally paid health plan premiums.
- Moving expenses T1M form (Please provide new and old work locations, addresses and total KMS travelled)
- Public Transit Weekly & Monthly Pass Receipts
- Rent or Property Taxes paid **if applicable to your situation.**
- Pension Split election amount (Please contact our office for details)
- RRSP - Home Buyers Plan receipts and documentation.
- RRSP Contribution Receipts
- Ontario Healthy Home Renovation Tax Credit Receipts (Seniors only)
- Travel, Employment or Commission Expenses - Form T2200/TL2 as required. Please provide details on the Work Sheet**
- Tuition Fees, education and textbooks as shown on the T2202A/TL11, **A REQUIRED FORM**
- Other items. Please provide details on a separate sheet.

If you have any questions please contact either of our office at 905-686-2407 or 905-666-2111 or email ajaxadmin@copetti.ca

SUPPLEMENTARY WORKSHEET

Please complete as applicable to your type of income and/or expense

YOU MAY FIND IT MORE CONVENIENT TO PROVIDE A SPREAD SHEET OF YOUR EXPENSES USING A SIMILAR FORMAT AS THIS WORKSHEET.

INCOME

BUSINESS

RENTAL

Rental Income

Self employed income

\$ _____

\$ _____

EXPENSES

Advertising

\$ _____

Meals and entertainment

Bad Debts

Insurance

Bank charges and Interest

Business fees dues licences & memberships

Office expenses

Supplies

Legal and Accounting fees

Management and administration fees

Rent of business premises

Maintenance and repairs

Salaries, wages and benefits of employees

Property taxes applicable to business/rental premises

Travel other than automobile

Subcontract cost

Telephone and communications including internet

Utilities related to business or rental premises

Motor vehicle cost (Please detail below)

Private health services plan premiums

Other

(Please provide details)

Capital additions (Type)

If you bought a new vehicle please provide

purchase agreement including any loan information.

VEHICLE EXPENSES

Bus Kms

Total Kms

Gasoline

\$ _____

Repairs & Maintenance

License

Interest on Loan

Insurance

Lease costs

Purchase/lease of new vehicle

WORK SPACE IN PERSONAL RESIDENCE (HOME)

Total Sq Ft

Bus. Sq Ft

Electricity and Water

\$ _____

Heat

Maintenance & repairs not including capital renovations

Insurance

Security

Telephone and communication (included Cable & Internet)

Property Taxes

Mortgage interest

Other costs(Provide details)

IF YOU HAVE COMMENTS AND OTHER INFORMATION PLEASE USE A SEPARATE SHEET