PRIDE ACCOUNTING AND TAX MANAGEMENT LTD.

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--*Please submit with your tax documentation*---

Profile Information

Last Name	First Name		SIN #
Street Address	City	Province	Postal Code
Telephone	E-mail		Date of Birth (dd/mm/yy)
Marital Status: ☐ Married ☐Single ☐Common-Law ☐Separated ☐Divorced ☐Widowed			
Spouse Last Name	Spouse First Name		

If change of marital status during the year, please indicate date of change:

Dependants

DEPENDANTS Please enter the following information for any qualifying child or qualifying relative:

Full Name	Date of Birth (dd/mm/yy)	Relationship	SIN #	Income	Child Care Expenses

Do any of the dependants have a disability?.. ☐ Yes ☐ No

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependant for this tax year?.. ☐ Yes ☐ No

Are any of the dependants transferring tuition tax credits for this tax year? .... ☐ Yes ☐ No

Did the taxpayer receive Universal Child Care Benefits (UCCB)? .... ☐ Yes ☐ No
If yes, please attach RC62 Slip.

Residency & Elections Canada

Is the taxpayer a Canadian Citizen? .... ☐ Yes ☐ No
Taxpayer authorizes CRA to provide his/her name, address, and birthdate to Elections Canada? .... ☐ Yes ☐ No

If your province or territory of residence changed, please enter the date of your move: ________________

Foreign Property / Investments

Taxpayer owns Specified Foreign Property with a total cost of more than CND $100,000? .... ☐ Yes ☐ No
If yes, please provide information from investment advisor.

Income & Deductions

Please select the following that applies to you and provide appropriate documentation for items selected.

Checklist for slips and receipts:

Income		Deductions
General		
☐ Employment Income	T4	☐ Signed T2200 or TL2 to claim Employment Expense
☐ Self-Employment & Commissions	T4A	☐ Union and Professional Dues
☐ Employment Insurance	T4E	☐ Child Care Expenses
☐ WCB/Social Assistance	T5007	☐ Moving Expenses for new employment
☐ Universal Child Care Benefits	RC62	☐ Alimony/Support Payments
☐ Foreign Income		☐ Tuition Receipts (T2202)
☐ Rental Income and Expenses		☐ RRSP Contributions
☐ Alimony/Spousal Support		☐ Interest paid to earn Investment Income
☐ U.S. Social Security		☐ Donation Receipts
☐ Farming/ Fishing Income and Expenses		☐ Carrying Charges
☐ Other:		☐ Disability Tax Credit
Investments		☐ Medical/Dental Receipts
☐ Trust or Estate / Mutual Fund Income	T3	☐ Extended Health Premiums
☐ Investment Income (Interests, Dividends)	T5	☐ Income Tax Installments
☐ Profit Sharing Plans Income	T4PS	☐ Children's Fitness or Art amount
☐ Partnership Income	T5013	☐ Public Transit Passes amount
☐ Security Transactions Income	T5008	☐ Statement for new home to claim home buyer's amount
☐ Other Capital Gains		☐ Other:

Were any amounts repaid during the year to a home buyers plan or lifelong learning plan? .... ☐ Yes ☐ No

Pension Information

Pension Income

☐ Pension, Retirement and Annuity Income	T4A
☐ Canada Pension Plan Benefits	T4A(P)
☐ Old-age Security Pension slip/ Foreign Pensions	T4A(OAS)
☐ Registered Retirement Savings Plan Income	T4RSP
☐ Registered Retirement Income Fund Income	T4RIF

Does the taxpayer elect to split eligible pension income with spouse or common-law partner? .... ☐ Yes ☐ No

Self-Employment / Business Income

Self-Employment Income and Expenses attached?.. ☐ Yes ☐ No

Did the taxpayer use a vehicle for business?
If yes, are the vehicle expenses and business mileage attached?.. ☐ Yes ☐ No

Did the taxpayer use a portion of his/her home for business?
If yes, are the home expenses and business square footage attached? .... ☐ Yes ☐ No

Is a list of all new asset additions and deletions attached?.. ☐ Yes ☐ No

Small Business Checklist

INCOME:
Invoices must be provided to accurately report business income.

EXPENSES:
Receipts must be provided in order to claim business expenses. If we are provided with a summary, amounts should be supported by receipts.

General

- ☐ Advertising
- ☐ Interest (on money borrowed to operate your business)
- ☐ Business tax, fees, licenses, dues, memberships/subscriptions
- ☐ Office supplies (pens, pencils, paper, etc.)
- ☐ Computer & equipment lease costs (must provide lease papers)
- ☐ Supplies (items used to conduct your business)
- ☐ Legal, accounting and other professional fees
- ☐ Rent (business location)
- ☐ Maintenance and repairs (on equipment)
- ☐ Travel (fares, hotel meals related to business travel)
- ☐ Cellphone (business portion only)
- ☐ Postage and delivery

Automobile

- ☐ Total kilometers driven in taxation year
- ☐ Total kilometers driven for business
- ☐ Fuel and oil
- ☐ Interest (must provide interest statement from bank)
- ☐ Maintenance and repairs
- ☐ Lease (must provide lease papers)
- ☐ Parking

Note: A vehicle logbook is required to validate kilometers driven.

Home Work Space

- ☐ Total area of house: _________ Total area of office: _________
- ☐ Gas & Electricity
- ☐ Insurance
- ☐ Maintenance
- ☐ Mortgage interest
- ☐ Property Taxes
- ☐ Rent

Note: Telephone is not an allowable home work space deduction

Rental Checklist

INCOME:
Tenant receipts must be provided to accurately report rental income.

EXPENSES:
Receipts must be provided to claim rental expenses. If we are provided with a summary, amounts should be supported by receipts.

General:

- ☐ Advertising
- ☐ Interest (on money borrowed to purchase property)
- ☐ Office supplies (pens, pencils, paper, etc.)
- ☐ Landscaping
- ☐ Accounting/bookkeeping (for rental property only)
- ☐ Strata fees (for condominium rentals)
- ☐ Maintenance and repairs
- ☐ Utilities (if included in rent)
- ☐ Property taxes
- ☐ Insurance

Motor Vehicle:

You can deduct reasonable motor vehicle expenses (with receipts) if you meet all the following conditions:

- ✓ You receive income from only one rental property that is in the general area where you live;
- ✓ You personally do part, or all, of the necessary repairs and maintenance on the property; and
- ✓ You have motor vehicle expenses to transport tools and materials to the rental property

- ☐ Total kilometers driven in taxation year
- ☐ Total kilometers driven for business
- ☐ Fuel and oil
- ☐ Interest on vehicle loan (must provide interest statement from bank)
- ☐ Insurance
- ☐ Maintenance and repairs
- ☐ Lease (must provide lease papers)

Note: A vehicle logbook is required to validate kilometers driven.

* Additional information may be required from small business and rental property owners.

Sale of Real Estate (INCLUDING principal residence)

☐ Provide the Agreement of Purchase and sale as well as the Statement of Account for BOTH your sale and purchase.

ONLY needed if first time or changed details:

Would you like to have all Government Tax or Child Tax Benefits deposited directly to you bank account? ☐ Yes ☐ No
If yes, please enclose a void cheque of your bank account.

Useful CRA links:

http://www.cra-arc.gc.ca/tx/ndvdls/ - Guidelines

http://www.cra-arc.gc.ca/gncy/txnf/ - Tax savings

Office Hours for the Tax Season (March 1st – April 30 2019):

Monday – Friday: 9:00 AM – 5:00 PM
Saturday: 10:00 AM – 3:00 PM
No appointments will be available the last 2 week of April 2019.

You can send your information by:

1. Mail or drop off at our office.
2. Email all info to taxman@prideaccounting.ca

IF in doubt which information to submit, add it anyway & we will take a look at it.

All documents will be returned to you with a copy of your return.

All tax returns submitted before 20 April 2019 are guaranteed to be completed.