



FOR EVERYONE TAX FORM

Please fill in the areas that apply to you and email the completed form to <info@flashcpa.ca>.

Name: _____

SIN: _____

1. Income (indicate as applicable)

If the slip is applicable, please choose which family member has the slip.

IMPORTANT: CRA assesses penalties for failing to report income. Please check the slip summary to confirm which slips you reported last year.

Is your spouse' s net Income Zero?

Is/are your dependent' s net Income Zero?

Name of slip Source of income	Description	You	Your spouse	Dependent 1	Dependent 2
T3	Statement of Trust Income	Click <input type="checkbox"/>			
T4	Statement of Remuneration				
T4A	Statement of Pension, Retirement, Annuity, Other				
T4A(OAS)	Old Age Security Pension				
T4A(P)	Canada / Quebec Pension Plan benefits				
T4RIF	Benefits from a Registered Retirement Income Fund				
T4RSP	Benefits from a Registered Retirement Savings Plan				
T4E	EI Benefits				
T4PS	Statement of Profit Sharing				
T5	Statement of Investment Income				
T5008	Statement of Securities Transactions Realized gain/loss report from bank or broker				
T5007	Statement of Benefits				
T5013	Statement of Partnership Income				
T5018	Statement of Contract Payments				
T600	Interest on Bonds				
Lump sums	OAS (form 1198), CPP, QPP				
No slips	Foreign pension income, director's fees, etc.				

If you have another source of income which isn't captured by the above, and you're not sure whether or not you have to report it, please describe on part 3(additional information), so we can confirm correct treatment.

2. Deductions and Tax Credits (indicate as applicable)

If the deduction or credit is applicable, please choose which family member has the deduction or credit.

Please attach receipts / slips / schedules for the following items.

Please include **AMOUNTS PAID DURING THE YEAR**. Provide all supporting receipts. If no receipt, please advise to who paid.

Description	You	Your spouse	Dependent 1	Dependent 2
RRSP contribution receipts				
Childcare deductions (include camp, after-school, daycare, nanny)				
Charitable Donations				
Medical Receipts				
Interest paid on loans to purchase investments / finance your company				
Investment counsel fees (excluding RRSP fees)				
Professional fees and dues (unless included on slips)				
Employment expenses (MUST have a signed T2200 - filled out in full) -				
Moving expenses (if you moved 40km closer to workplace - complex rules, ask us)				
Legal fees: - Collection / revision of support payments				
Legal fees: - - Related to severance payments				
Legal fees: - - Related to appeal a tax assessment				
Political Donations				
Rent paid				
Property taxes paid				
Public transit passes				
Ontario Healthy Homes Renovation Credit (for seniors - can claim up to \$10,000 in eligible costs)				
Home Accessibility credit (can claim up to \$10,000 in eligible costs)				
Teacher / ECE school supply credit (can claim up to \$1,000 in eligible costs)				

Please tell us if you or a family member served as a volunteer firefighter.

If so, was it for > 200 Hours? or < 200 Hours?

3. Please provide below any additional information you feel is relevant:

Are you or your family member self-employed?

Do you or your family member have rental income?

If you or your family member have self-employed or have rental income, we will contact you to follow up.

If you do not have investment and properties, alimony(spousal) support payment, disability deduction, disposal of your principal private residence or student tuition payment (student loan), you do not need to complete the following section.

If you have investment and properties, alimony(spousal) support payment, disability deduction, disposal of your principal private residence or student tuition payment (student loan), please continue on the next page.

Investments and properties

	Enclosed
Listing / summary of all investment purchases and sales or Realized gain/loss report from bank	Click <input type="checkbox"/>
Broker's summary of account transactions for the year	Click <input type="checkbox"/>
Security Buy & Sell vouchers	Click <input type="checkbox"/>

Alimony / Spousal Support payments

Please provide copy of any new / revised agreements that came into force during year. Spousal support is taxable/deductible in certain circumstances. Child support is neither taxable nor deductible.

		Total Amount	Name of Payer/ee	Sin of Payer/ee
<input type="checkbox"/> Received	<input type="checkbox"/> Paid			

Students

Tuition fees paid _____

(T2202/T2202A required - Student MUST sign back of slip to transfer credit to parent)

Student loan interest paid _____

Bursaries / scholarships received (include T4A slips) _____

Disability deduction for any family member

Dependents include children, parents, grandparents, siblings. (Form T929 and/or T2201 - must live with you.)

To be claimed for: _____

First year: (If yes, need form T929)

Principal private residence ("PPR")

You still pay no tax on the sale of your PPR - but must report it on your tax return. There may be some taxes if you lived elsewhere or rented out some/all of your home while you owned it. Even if no taxes, CRA assesses penalties for failing to report sale.

Address of property _____ Date sold (YYYY/MM/DD) _____

Year of purchase (YYYY/MM/DD) _____

Sales proceeds (before costs) \$ _____

Did you buy your first home this year (or buy again after renting for > 4 years)?

If so, please call our office, as you may be eligible for First Time Home Buyers Tax Credit (worth \$750)