

# TAX CHECKLIST

INCOME TAX TIPS HELP SAVE YOU MONEY! EASY WORKSHEETS & TAX TIPS AVAILABLE AT [WWW.BPTAX.CA](http://WWW.BPTAX.CA)

Current Address:

Please confirm that this address is correct:

If your address has changed, your new mailing address is: \_\_\_\_\_

Marital Status as of Dec. 31st:  Married  Common Law  Widowed  Divorced  Separated  Single

Birth Date: MM / DD / YEAR Spouse's Birthdate: MM / DD / YEAR

	Dependant	Dependant	Dependant	Dependant	Dependant
Full Name:					
Date of Birth:	<u>MM / DD / YEAR</u>	<u>MM / DD / YEAR</u>	<u>MM / DD / YEAR</u>	<u>MM / DD / YEAR</u>	<u>MM / DD / YEAR</u>

Have you sold your Principal Residence this year?  Yes  No

Total Property Taxes: \$ \_\_\_\_\_ Total Rent : \$ \_\_\_\_\_

Total Medical Expenses: \$ \_\_\_\_\_ **Please Note:** CRA only allows Medical Expenses that exceed 3% of your gross income.

Total Charitable Donations: \$ \_\_\_\_\_ **THERE IS AN EXTRA CHARGE IF WE HAVE TO TOTAL RECEIPTS.**

LISTED BELOW ARE ALL THE RECEIPTS/SLIPS/DOCUMENTS WE NEED TO PREPARE YOUR TAX RETURN.

T SLIPS REQUIRED TO SUBMIT		TAX WORKSHEETS	
T4 EMPLOYMENT INCOME		CHARITABLE DONATIONS	WORKSHEET
T4E EMPLOYMENT INSURANCE		MEDICAL RECEIPTS	WORKSHEET
T4A OTHER INCOME		PROPERTY TAX / RENT RECEIPTS	WORKSHEET
T3 TRUST INCOME		RRSP CONTRIBUTIONS	WORKSHEET
T5 INVESTMENT INCOME		CHILDCARE RECEIPTS	WORKSHEET
T4AP CANADA PENSION PLAN		SPOUSAL SUPPORT PAYMENTS	WORKSHEET
T4A (OAS) OLD AGE SECURITY		CAREGIVER AMOUNT	WORKSHEET
T4RIF RIF INCOME		CAPITAL GAINS/LOSSES	WORKSHEET
T4RSP RRSP INCOME		UNION & PROFESSIONAL DUES	WORKSHEET
T2202 TUITION RECEIPTS	Tax Tip	MOVING EXPENSES	WORKSHEET
HST RETURN FOR SMALL BUSINESS	Access Code		

Please go to [www.bptax.ca](http://www.bptax.ca) to download the required worksheet if any of the following applies to you

<p><b>EMPLOYMENT EXPENSES</b></p> <p>If you are employed and have obtained a T2200 Conditions of Employment, please download <b>WORKSHEET FOR EMPLOYMENT EXPENSE</b> at <a href="http://www.bptax.ca">www.bptax.ca</a></p>	<p><b>RENTAL PROPERTIES</b></p> <p>If you own a rental property, please download <b>WORKSHEET FOR RENTAL PROPERTIES</b> at <a href="http://www.bptax.ca">www.bptax.ca</a></p>	<p><b>SELF-EMPLOYED - SMALL BUSINESS</b></p> <p>If you are self-employed or own a small business, please download <b>WORKSHEET FOR SMALL BUSINESS</b> at <a href="http://www.bptax.ca">www.bptax.ca</a></p>
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## CONTACT US



**BRIAN PETERSEN**  
 MBA, CPA, CMA, CFP  
 TAX SERVICES YOU CAN TRUST

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[www.bptax.ca](http://www.bptax.ca)

SPOUSE, LAST NAME

LAST NAME

SPOUSE, FIRST NAME

FIRST NAME

PHONE #

EMAIL

If it has changed, your new e-mail is:  
 Please confirm that this e-mail address is correct

FILE #

PLEASE VERIFY ALL INFORMATION IS CORRECT AND MAKE ANY NECESSARY CHANGES

(Office Use Only)