TAX CHECKLIST

INCOME TAX TIPS HELP SAVE YOU MONEY! EASY WORKSHEETS & TAX TIPS AVAILABLE AT 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:	MM / DD / YEAR	MM / DD / YEAR	MM / DD / YEAR	MM / DD / YEAR	MM / DD / YEAR

Have you sold your Principal Residence this year?   ☐ Yes   ☐ No

Total Property Taxes: $ _____	**Total Rent:** $ _____	
Total Medical Expenses: $ _____		
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	TaxTip	MOVING EXPENSES	WORKSHEET
HST RETURN FOR SMALL BUSINESS	Access Code	DIGITIAL NEWS SUBSCRIPTION	

Please go to www.bptax.ca to download the required worksheet if any of the following applies to you

EMPLOYMENT EXPENSES
If you are employed and have obtained a T2200 Conditions of Employment, please download **WORKSHEET FOR EMPLOYMENT EXPENSE** at www.bptax.ca

RENTAL PROPERTIES
If you own a rental property, please download **WORKSHEET FOR RENTAL PROPERTIES** at www.bptax.ca

SELF-EMPLOYED - SMALL BUSINESS
If you are self-employed or own a small business, please download **WORKSHEET FOR SMALL BUSINESS** at www.bptax.ca

CONTACT US

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TAX SERVICES YOU CAN TRUST

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www.bptax.ca

(Side margin labels)

SPOUSE, LAST NAME — LAST NAME

SPOUSE, FIRST NAME — FIRST NAME

PHONE #

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

FILE #

(Office Use Only)

PLEASE VERIFY ALL INFORMATION IS CORRECT AND MAKE ANY NECESSARY CHANGES