

2023 TAX INFORMATION BOOKLET

23

STEP 1

Complete below and provide required documents.

NEW CLIENT? YES NO

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TAXPAYER – PRIMARY CONTACT

* Required by new clients only

LAST NAME	FIRST NAME	* D.O.B. MM/DD/YYYY	* S.I.N.
PHONE	EMAIL		
ADDRESS STREET	CITY	PROVINCE	POSTAL CODE
CANADIAN CITIZEN YES <input type="checkbox"/> NO <input type="checkbox"/>	SHARE INFORMATION WITH ELECTIONS CANADA? YES <input type="checkbox"/> NO <input type="checkbox"/>		

MARITAL STATUS as of December 31

SINGLE <input type="checkbox"/>	COMMON LAW <input type="checkbox"/>	MARRIED <input type="checkbox"/>	SEPARATED <input type="checkbox"/>	DIVORCED <input type="checkbox"/>	WIDOWED <input type="checkbox"/>
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SPOUSE/PARTNER

* Required by new clients only

LAST NAME	FIRST NAME	* D.O.B. MM/DD/YYYY	* S.I.N.
ADDRESS SAME AS ABOVE? YES <input type="checkbox"/> NO <input type="checkbox"/>	IF NO, PLEASE PROVIDE		
STREET	CITY	PROVINCE	POSTAL CODE
CANADIAN CITIZEN YES <input type="checkbox"/> NO <input type="checkbox"/>	SHARE INFORMATION WITH ELECTIONS CANADA? YES <input type="checkbox"/> NO <input type="checkbox"/>		

DEPENDANTS

LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.
TAX RETURN REQUIRED FOR THIS DEPENDANT? YES <input type="checkbox"/> NO <input type="checkbox"/>			
LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.
TAX RETURN REQUIRED FOR THIS DEPENDANT? YES <input type="checkbox"/> NO <input type="checkbox"/>			
LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.
TAX RETURN REQUIRED FOR THIS DEPENDANT? YES <input type="checkbox"/> NO <input type="checkbox"/>			
LAST NAME	FIRST NAME	D.O.B. MM/DD/YYYY	S.I.N.
TAX RETURN REQUIRED FOR THIS DEPENDANT? YES <input type="checkbox"/> NO <input type="checkbox"/>			



BRIAN PETERSEN
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TAX SERVICES YOU CAN TRUST

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STEP 2

Select how you would like to submit your documents and receive your return.

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- Portal accounts provide access to **view and print tax returns 24/7**, no need to have a hard copy or keep original documents. Everything is scanned and loaded to the portal for you.
- In an effort to lower our carbon footprint, printed returns are by request only.

A) **SUBMIT, SIGN & PAY ELECTRONICALLY** – Submit by email or portal, DocuSign, electronic payment

EMAIL DOCUMENTS TO: office@bptax.ca INVITE TO PORTAL? YES NO

OR
 LOAD DIRECTLY TO IFIRM PORTAL IF ALREADY REGISTERED: <https://bptax.cchifirm.ca/clientportal>

B) **SUBMIT IN PERSON OR MAIL, SIGN & PAY ELECTRONICALLY**

Submit in person or mail, return to pick-up originals, DocuSign, electronic payment
INVITE TO PORTAL? YES NO PRINTED COPY OF TAX RETURN? YES NO (Return included with DocuSign)

C) **SUBMIT, SIGN & PAY IN PERSON**

Submit in person, return to pick-up originals, sign and pay in person
INVITE TO PORTAL? YES NO PRINTED COPY OF TAX RETURN? YES NO

STEP 3

Complete below and submit totals, documents and worksheets.
Worksheets are available at www.bptax.ca

SUBMIT APPLICABLE FORMS: T4, T4E, T4A, CPP, OAS, T4RIF, T4RSP, T2202, T3, T5, T5008, T5013

TOTAL PROPERTY TAXES PAID \$

TOTAL RENT PAID \$

SUBMIT **FINAL** PROPERTY TAX ASSESSMENT **OR**

SUBMIT RECEIPT FROM LANDLORD

MEDICAL RECEIPTS PAID \$

CHARITABLE DONATIONS MADE \$

INCLUDE WORKSHEET & RECEIPTS

INCLUDE WORKSHEET & RECEIPTS

HAVE YOU SOLD YOUR PRINCIPAL RESIDENCE THIS YEAR? YES NO **IF YES**, PLEASE PROVIDE
YEAR PURCHASED PROCEEDS OF DISPOSITION (SOLD FOR) \$

NEW YOU ARE REQUIRED TO FILE THE VACANT UNIT TAX BY **MARCH 31, 2024** WITH YOUR MUNICIPALITY.

NEW ALL TRUSTS, INCLUDING BARE TRUSTS MUST NOW PROVIDE A T3 RETURN ON AN ANNUAL BASIS.
YOU ARE REQUIRED TO FILE BY **APRIL 2, 2024** T3 RETURN REQUIRED? YES NO ^Additional charge applies

EMPLOYMENT EXPENSES

ARE YOU CLAIMING HOME OFFICE EXPENSES AGAINST EMPLOYMENT INCOME? YES NO

IF YES, SUBMIT WORKSHEET FOR EMPLOYMENT EXPENSES – PLEASE **DO NOT** SUBMIT RECEIPTS

RENTAL PROPERTIES

DO YOU OWN RENTAL PROPERTIES? YES NO

IF YES, SUBMIT SEPARATE WORKSHEETS FOR **EACH RENTAL PROPERTY** – PLEASE **DO NOT** SUBMIT RECEIPTS

SMALL BUSINESS

ARE YOU SELF-EMPLOYED **OR** DO YOU OWN A SMALL BUSINESS? YES NO

IF YES, SUBMIT SEPARATE WORKSHEETS FOR **EACH BUSINESS** – PLEASE **DO NOT** SUBMIT RECEIPTS

ARE YOU REGISTERED FOR HST? YES NO **IF YES**, SUBMIT A COPY WITH THE **ACCESS CODE**

STEP 4

Complete below and submit documents.

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ALL CLIENTS ARE REQUIRED TO SIGN AND DATE THE APPROPRIATE FOREIGN INVESTMENTS AND PROPERTY DECLARATION BELOW.**FOREIGN INVESTMENTS AND PROPERTY** **YES**, I OWNED FOREIGN INVESTMENTS OR FOREIGN PROPERTY OF MORE THAN \$100,000 CDN IN 2023**IF YES**, CHECK APPLICABLE BOXES **FOREIGN INVESTMENTS** – PLEASE PROVIDE THE **T1135** FOREIGN INCOME VERIFICATION STATEMENT PREPARED BY YOUR BROKER **FOREIGN PROPERTY** – PLEASE PROVIDE YOUR PROPERTY DETAILS BELOW

FULL ADDRESS

PURCHASE PRICE \$

YEAR OF PURCHASE

SIGNATURE

PRINT NAME

DATE SIGNED MM/DD/YYYY

OR **NO**, I DID NOT OWN FOREIGN INVESTMENTS OR FOREIGN PROPERTY OF MORE THAN \$100,000 CDN IN 2023

SIGNATURE

PRINT NAME

DATE SIGNED MM/DD/YYYY

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PLEASE SUBMIT NO LATER THAN WEDNESDAY **APRIL 24, 2024**.
TAX FILES RECEIVED AFTER APRIL 24, 2024 MAY BE E-FILED IN MAY.

Tax Deadline

April 30, 2024

WORKSHEETS

NO RECEIPTS REQUIRED

EMPLOYMENT EXPENSE WORKSHEET

COMPLETE THIS IF YOU ARE EMPLOYED AND HAVE OBTAINED A **T2200 CONDITIONS OF EMPLOYMENT**

RENTAL PROPERTIES WORKSHEET

COMPLETE THIS PAGE FOR **EACH** RENTAL PROPERTY THAT YOU OWN

SMALL BUSINESS WORKSHEET

COMPLETE THIS PAGE IF YOU ARE SELF-EMPLOYED OR OWN A SMALL BUSINESS

Available at

www.bptax.ca

T SLIPS REQUIRED

INCLUDE APPLICABLE FORMS, IN THIS ORDER

- T4 EMPLOYMENT INCOME
- T4E EMPLOYMENT INSURANCE
- T4A OTHER INCOME
- T4AP CANADA PENSION PLAN INCOME
- T4A OLD AGE SECURITY
- T4RIF REGISTERED RETIREMENT INCOME FUND
- T4RSP REGISTERED RETIREMENT SAVINGS PLAN
- T2202 TUITION
- T3 TRUST INCOME
- T5 INVESTMENT INCOME
- T5008 CAPITAL GAINS/LOSSES
- T5013 LIMITED PARTNERSHIP INVESTMENT INCOME

TIPS FOR SUBMITTING RETURN

- ✓ USE PAPER CLIPS OR CLIPS
- ✓ REQUEST YEARLY STATEMENTS FROM YOUR PHARMACY, DENTIST, OPTOMETRIST, ETC. (IF NOT POSSIBLE – SORT, CLIP & TOTAL)
- ✓ TOTAL ALL RECEIPTS WHERE REQUESTED
- ✓ USE ALL APPLICABLE WORKSHEETS
- ✓ SORT BY PRIMARY, PARTNER, DEPENDANTS
- ✓ SORT T SLIPS AS LISTED ABOVE
- ✓ CONSIDER SUBSCRIBING TO IFIRM PORTAL

WORKSHEETS & RECEIPTS REQUIRED

TOTAL RECEIPTS, INCLUDE WITH RETURN

- CHARITABLE DONATIONS
- MEDICAL RECEIPTS
- PROPERTY TAX/RENT RECEIPTS
- CHILDCARE RECEIPTS
- SPOUSAL SUPPORT PAYMENTS
- CAREGIVER EXPENSES
- DIGITAL NEWS SUBSCRIPTIONS
- UNION & PROFESSIONAL DUES
- MOVING EXPENSES

PLEASE DO NOT

- × INCLUDE ENVELOPES
- × USE STAPLES OR POST IT NOTES
- × SUBMIT IN BINDERS, HARD CASES, FOLDERS, ETC.
- × SUBMIT UNTOTALLED RECEIPTS (AN ADDITIONAL \$50 CHARGE MAY BE APPLIED)
- × SUBMIT LAST YEARS TAX RETURN (UNLESS REQUESTED)
- × INCLUDE MONTHLY UTILITY STATEMENTS
- × INCLUDE ANY PROMOTIONAL/MARKETING PAGES FROM INVESTMENT/BANKING STATEMENTS