

ESTATE TAX INFORMATION FORM

OFFICE USE ONLY

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STEP 1

Complete below and provide required documents.

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TAXPAYER – ESTATE OF THE LATE

LAST NAME	FIRST NAME	S.I.N.	_____	
D.O.B. MM/DD/YYYY		D.O.D. MM/DD/YYYY		
ADDRESS STREET	CITY	PROVINCE	POSTAL CODE	
CANADIAN CITIZEN YES <input type="checkbox"/> NO <input type="checkbox"/>				

SPOUSE/PARTNER

LAST NAME	FIRST NAME	S.I.N.	_____		D.O.B. MM/DD/YYYY
ADDRESS SAME AS ABOVE? YES <input type="checkbox"/> NO <input type="checkbox"/>	IF NO , PLEASE PROVIDE				
STREET	CITY	PROVINCE	POSTAL CODE		
PHONE	EMAIL				
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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APPOINTMENT OF EXECUTOR

LAST NAME	FIRST NAME			
ADDRESS STREET	CITY	PROVINCE	POSTAL CODE	
PHONE	EMAIL			

DOCUMENTS REQUIRED

DEATH CERTIFICATE <input type="checkbox"/>	AND	WILL <input type="checkbox"/>
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BRIAN PETERSEN
MBA, CPA, CMA, CFP
TAX SERVICES YOU CAN TRUST

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ESTATE TAX INFORMATION FORM

STEP 2

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 \$
OR	
SUBMIT FINAL PROPERTY TAX ASSESSMENT	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 <input type="checkbox"/> NO <input type="checkbox"/>	IF YES, PLEASE PROVIDE
YEAR PURCHASED	PROCEEDS OF DISPOSITION (SOLD FOR) \$

EMPLOYMENT EXPENSES

ARE YOU CLAIMING HOME OFFICE EXPENSES AGAINST EMPLOYMENT INCOME? YES <input type="checkbox"/> NO <input type="checkbox"/>
IF YES, SUBMIT WORKSHEET FOR EMPLOYMENT EXPENSES – PLEASE DO NOT SUBMIT RECEIPTS

RENTAL PROPERTIES

DO YOU OWN RENTAL PROPERTIES? YES <input type="checkbox"/> NO <input type="checkbox"/>
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 <input type="checkbox"/> NO <input type="checkbox"/>
IF YES, SUBMIT SEPARATE WORKSHEETS FOR EACH BUSINESS – PLEASE DO NOT SUBMIT RECEIPTS
ARE YOU REGISTERED FOR HST? YES <input type="checkbox"/> NO <input type="checkbox"/> IF YES, SUBMIT A COPY WITH THE ACCESS CODE

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



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