

2024 TAX INFORMATION

24

STEP 1

COMPLETE BELOW AND PROVIDE REQUIRED DOCUMENTS

PAGE 1 OF 4

NEW CLIENT YES NO *required by new clients only

TAXPAYER – PRIMARY CONTACT

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

LAST NAME	FIRST NAME	*D.O.B. MM/DD/YYYY	*S.I.N. -----
CANADIAN CITIZEN YES <input type="checkbox"/> NO <input type="checkbox"/>		SHARE INFO 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"/>			



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

21-73 Wilson Street West, Ancaster, Ontario L9G 1N1
905.648.8656 | office@bptax.ca | www.bptax.ca

STEP 2

SELECT HOW YOU WOULD LIKE TO SUBMIT YOUR DOCUMENTS
AND RECEIVE YOUR RETURN

NEW

1. To reduce our carbon footprint, printed returns are available by **request only** and cost **\$25**
2. Original documents or printed tax returns not picked up by **May 30, 2025** will be shredded

YES, I HAVE READ THE CHANGES ABOVE

Clients submitting via our secure CCH iFirm Portal: <https://bptax.cchifirm.ca/clientportal>
or clients emailing documents to office@bptax.ca – sign and pay online with no hard copies,
but have access to files 24/7.



Access to print is always
available two ways!

1. CCH iFirm Portal
2. Return attached via DocuSign

You can also download your NOA (Notice of Assessment) on CRA. Simply register to access
My Account: <https://canada.ca/en/revenue-agency/services/e-services/cra-login-services.html>

A) SUBMIT IN PERSON OR MAIL, SIGN & PAY ELECTRONICALLY

Submit in person or mail, return to pick-up originals, DocuSign, electronic payment

A digital copy of your tax return will be provided with DocuSign.

We will **NOT** print a hardcopy unless specified below.

PRINTED COPY OF TAX RETURN? ***NEW***

YES, PLEASE PROVIDE A PRINTED COPY OF RETURN FOR AN ADDITIONAL FEE OF \$25

B) SUBMIT, SIGN & PAY IN PERSON

Submit in person, return to pick-up originals, sign and pay in person

We will **NOT** print a hardcopy unless specified below.

PRINTED COPY OF TAX RETURN? ***NEW***

YES, PLEASE PROVIDE A PRINTED COPY OF RETURN FOR AN ADDITIONAL FEE OF \$25



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STEP 3

COMPLETE AND INCLUDE THE PROVIDED WORKSHEETS

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

\$

NEW INCLUDE YEARLY STATEMENT

INCLUDE WORKSHEET & RECEIPTS

We no longer accept **individual** medical receiptsHAVE YOU SOLD YOUR PRINCIPAL RESIDENCE THIS YEAR? YES NO **IF YES**, PLEASE PROVIDE

YEAR PURCHASED

PROCEEDS OF DISPOSITION (SOLD FOR)

\$

EMPLOYMENT EXPENSESARE 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 RECEIPTSARE YOU REGISTERED FOR HST? YES NO **IF YES**, SUBMIT A COPY
WITH THE **ACCESS CODE****BRIAN PETERSEN**

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STEP 4

COMPLETE BELOW AND SUBMIT DOCUMENTS

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 2024 **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 2024

SIGNATURE

PRINT NAME

DATE SIGNED

MM/DD/YYYY



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QUICK REFERENCE

PLEASE SUBMIT NO LATER THAN **TUESDAY, APRIL 22, 2025**

TAX FILES RECEIVED AFTER APRIL 22, 2025 WILL NOT BE FILED BY THE APRIL 30, 2025 DEADLINE.

TAX DEADLINE

April 30, 2025

WORKSHEETS NO RECEIPTS REQUIRED

EMPLOYMENT EXPENSE WORKSHEET

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

Available at

www.bptax.ca

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

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. (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

- x **SUBMIT UNTOTALLED MEDICAL RECEIPTS (A \$50 FEE MAY INCUR IF WE ARE REQUIRED TO SORT AND TOTAL YOUR INDIVIDUAL RECEIPTS)**
- x USE STAPLES, POST IT NOTES OR INCLUDE ENVELOPES
- x SUBMIT IN BINDERS, HARD CASES, FOLDERS, ETC.
- x SUBMIT PRIOR TAX RETURNS (UNLESS REQUESTED)
- x INCLUDE MONTHLY UTILITY STATEMENTS
- x INCLUDE ANY PROMOTIONAL/MARKETING PAGES
- x FROM INVESTMENT/BANKING STATEMENTS