

Income from self-employment

Check if applicable to you	If applicable please provide	Name 1	Name 2
☐ General, Business, Farm, Air BnB	Record of all revenues and expenses		
☐ COVID-19 support	CEBA Loan / CEWS / CERS		
☐ Assets purchased/sold during year	Dates, descriptions, details		
☐ Any partner	Name (s) and share (s)		
☐ Salary paid to spouse	Details of work done		
☐ Inventory / WIP	Value of closing inventory		
☐ Accounts receivable, payable	List of each		
☐ Any special elections in prior years	Details		
☐ GST return	completed or to do		
☐ Accounting software & passwords			

Rental income

Check if applicable to you	If applicable please provide	Name 1	Name 2
☐ General	Details of all revenue and expenses		
☐ New properties	Purchase agreement and details		
☐ Rental of part of residence	Details of split		
☐ Change of use of property	Date and details		
☐ Sale of rental property	Sale documents and details of purchase		

Sale/exchange of investments

Check if applicable to you	If applicable please provide	Name 1	Name 2
☐ Stocks, bonds, trust units – T5008 slip	Transaction slips/details, broker statements (for any month with a transaction, plus for month of Dec)		
☐ Digital Currency (Bit coin)	Full details		
☐ Foreign Investments	Full details		
☐ Real estate and other properties	Sale documents, details of purchase		
☐ Any properties gifted to others	Full details		
☐ Elections in Prior Year(s)	Full details		
☐ Prior year Reserves	Full details		



Red Deer

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Didsbury

PO Box 2715
#121 – 1001 20 Avenue
Didsbury, AB T0M 0W0
T: 403-335-9167
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Employment related expenses

Check if applicable to you	If applicable please provide	Name 1	Name 2
☐ General – required by employer to pay certain expenses	Form T2200 Conditions of Employment		
☐ Apprentice/Tradesman tools	Full details		
☐ Travel/Auto	Records of expenses. vehicle details, calc. of business mileage		
☐ Moving expenses	Details		
☐ Other expenses	Details		
☐ Labor Mobility Deduction	Details		
☐ Transport employees	Form TL2		
☐ Union, Assoc. or Professional Dues	Official tax receipts		
☐ Volunteer Firefighter/Search & Rescue			
☐ Educator School Supply Expenses	Detailed List – approved		
☐ Home Office	Detailed T2200 and expenses		

Commission related expenses

Check if applicable to you	If applicable please provide	Name 1	Name 2
☐ Travel/Auto	Record of expenses and calculation of business portion of use		
☐ Auto log	Record business mileage		
☐ Sales expenses	Record of expenses		
☐ Office in home	Form T2200 and details of area used & cost of home, including interest, taxes		

Investment expenses

Check if applicable to you	If applicable please provide	Name 1	Name 2
☐ Borrow money to earn invest. income	Record of amounts paid		
☐ Borrowed on margin account (stocks)	Records from broker		
☐ Accounting fees	Details of charges or our fees		
☐ Investment management fees	Details of charges		
☐ Tax shelters	Purchase documents		
☐ Loss on shares or loss on loans to private company	Full details		



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All other deductions

Check if applicable to you	If applicable please provide	Name 1	Name 2
Alimony or separation allowance pd	Record of payment and details		
Adoption fees			
Child care expenses	Details of payments		
Canada Training Credit			
Digital News Subscription Tax Credit			
Moving Expenses	Details		
Tuition fees over \$100 (post-secondary)	Form T2202, T2202A or TLI1A		
Interest paid on student loans	Official tax receipts		
New Home Purchase	Details		
First Home Savings Account	Account opened / Contributions		
Home Buyers Plan	Withdrawals / repayments		
RRSP contribution receipts:	• RRSP – current year • RRSP – First 60 days • Registered Disability Savings Plan • Stocks/bonds rolled over		
Donations to registered charities	Nursing home / attendant care		
Donations unused prior year	Medical Travel expenses		
Political Contributions paid	Private health premiums		
Medical expenses for any 12 month period ending in the tax year	Travel insurance		
Multigenerational Home Renovation Grants			
Disability: self or dependent	• Form T2201 (first year) • Home Accessibility Tax Credit Claim • Required an attendant to earn income (form T929) • Contribute to support of relative • Parents or parents (over 65) live with you • New caregiver amount		
Income Tax Instalments Paid	Details of payments		



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Capital Gains Deduction

Check if applicable to you	If applicable please provide	Name 1	Name 2
Assets that would still qualify to claim the capital gains deduction (i.e. farm property, small business corporation shares sold)	Complete details • date acquired and sold • cost • value on Dec 31, 1971 (if applicable)		

Foreign reporting requirements and miscellaneous

Check if applicable to you	If applicable please provide	Name 1	Name 2
Owned assets outside Canada with a cost in excess of \$100,000 (Cdn funds) \$250,000 (Cdn funds)	Full details		
Became or ceased to be a resident	Date of status change		
Citizenship:	• Cdn • US/Other • Visa type & number		
US Visa	Visa type & number		
Born in US			
US Citizen – owns 10% of CAN corporation			
One or more parents born in US			
US Tax Return Required	1040 NR / 1040		
Form 8840	Required		
# Days in US			

Date prepared: _____

Notification: Phone / Text / Email / Portal

Staff Signature: _____

Signing: Red Deer / Trochu / Didsbury / Electronic

Delivery: Red Deer / Trochu / Didsbury / Electronic
Courier / Other _____



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