

### Your 2015 Income

Check if you have any of the following income items:

Item	Slips to Bring
<input type="checkbox"/> Employment income	T4
<input type="checkbox"/> Taxable disability income	T4A
<input type="checkbox"/> Profit sharing income	T4PS
<input type="checkbox"/> Commission income	T4 or T4A
<input type="checkbox"/> Old Age Security income	T4A
<input type="checkbox"/> Canada Pension Plan income	T4AP
<input type="checkbox"/> Other pension/annuity income	T4A
<input type="checkbox"/> RRSP income	T4RSP
<input type="checkbox"/> RRIF income	T4RIF
<input type="checkbox"/> Withdrawals from RRSP	T4RSP
<input type="checkbox"/> EI Benefits	T4E
<input type="checkbox"/> Worker's Compensation (WSIB)	T5007
<input type="checkbox"/> Social assistance payments	T5007
<input type="checkbox"/> Dividend income	T3s and T5s
<input type="checkbox"/> Interest income	T3s and T5s
<input type="checkbox"/> Limited partnership income	T5013
<input type="checkbox"/> Rental property income	See page 3
<input type="checkbox"/> Sale of real estate	See page 3
<input type="checkbox"/> Sale of non-RRSP stocks	See page 3
<input type="checkbox"/> Sale of non-RRSP mutual funds	See page 3
<input type="checkbox"/> Self-employed income	See page 4
<input type="checkbox"/> Alimony income	\$ _____
<input type="checkbox"/> Other income:	
Universal child care benefit	\$ _____
_____	\$ _____

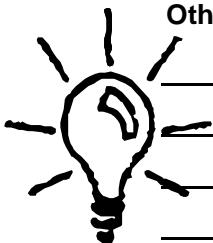
### Your 2015 Deductions/Credits

Check if you have any of the following:  
Please include receipts.



Item	Amount
1 RRSP - contributions	\$ _____
2 Labour -sponsored fund contributions	\$ _____
3 Union Dues, professional fees	\$ _____
4 Child care expenses	\$ _____
5 Moving expenses	\$ _____
6 Alimony payments made	\$ _____
7 Legal fees for investment loan	\$ _____
8 Investment loan interest paid and details	\$ _____
9 Rent paid	\$ _____
10 Property taxes paid	\$ _____
11 Public transit amounts	\$ _____
12 Child fitness payments max \$1,000/child	\$ _____
13 Child Activity/Arts payments max \$500/child	\$ _____
14 OSAP loan repayment interest	\$ _____
15 Examination & Tuition fees for yourself	\$ _____
16 Children's/spouse's tuition fees	\$ _____
17 Medical expenses	\$ _____
18 Charitable donations	\$ _____
19 Political party contributions	\$ _____
20 Tax instalments paid to the government	\$ _____
21 Ontario Renovations For Seniors	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Other information you would like to tell us about.




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**If you are not sure we'll need it, bring it along!**

## Rental Property Income & Expenses



Address \_\_\_\_\_

Joint owner \_\_\_\_\_

Jt. Ownership % \_\_\_\_\_

Income (rent collected) \$ \_\_\_\_\_

### Expenses

Advertising \_\_\_\_\_ \$ \_\_\_\_\_

Insurance \_\_\_\_\_ \$ \_\_\_\_\_

Interest \_\_\_\_\_ \$ \_\_\_\_\_

Office expenses \_\_\_\_\_ \$ \_\_\_\_\_

Legal, accounting, and other professional fees \_\_\_\_\_ \$ \_\_\_\_\_

Management and administration fees \_\_\_\_\_ \$ \_\_\_\_\_

Maintenance and repairs \_\_\_\_\_ \$ \_\_\_\_\_

Salaries, wages, and benefits (including employer's) \_\_\_\_\_ \$ \_\_\_\_\_

Property taxes \_\_\_\_\_ \$ \_\_\_\_\_

Travel \_\_\_\_\_ \$ \_\_\_\_\_

Utilities \_\_\_\_\_ \$ \_\_\_\_\_

Other Expenses \_\_\_\_\_ \$ \_\_\_\_\_

Major renovations & purchases (ie. Appliances) \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

*If the property was purchased in the year, please provide the details.*

## Sale of Real Estate (excluding personal residence)



Address \_\_\_\_\_

Date Sold \_\_\_\_\_

Joint owner \_\_\_\_\_

Jt. Ownership % \_\_\_\_\_

Date Purchased \_\_\_\_\_

Purchase price \_\_\_\_\_ \$ \_\_\_\_\_

Legal costs on purchase \_\_\_\_\_ \$ \_\_\_\_\_

Additions / major improvements: \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Sale Price \_\_\_\_\_ \$ \_\_\_\_\_

Legal costs on sale \_\_\_\_\_ \$ \_\_\_\_\_

Commissions paid on sale \_\_\_\_\_ \$ \_\_\_\_\_

Other selling expenses \_\_\_\_\_ \$ \_\_\_\_\_



## Sale of Non-RRSP Stock (please provide broker's receipts for both the purchase and the sale)

Name of Stock	Date Sold (dd/mm/yy)	Number of Shares	Sale* Price	Purchase* Price	Commissions Paid

\* Price per share

## Sale or Transfer of Non-RRSP Mutual Funds (including systematic withdrawal programs)

Please provide the December 31, 2015 year end statements for all of your non-RRSP mutual funds. These statements were sent to you by the mutual fund companies in January 2015. The statements show all transactions for 2014, including any sale, redemption or transfer of your shares in the mutual fund during the year.

List all of your mutual funds that had shares sold or transferred during 2015.



\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Self-Employed Income & Expenses



Name of Business \_\_\_\_\_

Number of internet webpages and websites does the business earn income from \_\_\_\_\_

Percentage of gross income from the web \_\_\_\_\_ %

Please list on back of this page

Joint Owner and % \_\_\_\_\_

**Revenue** \$ \_\_\_\_\_

### Expenses

Purchases \$ \_\_\_\_\_

Advertising \$ \_\_\_\_\_

Meals and Entertainment \$ \_\_\_\_\_

Bad Debts \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Interest and bank charges \$ \_\_\_\_\_

Business tax, fees, licenses, dues, memberships \$ \_\_\_\_\_

Office expenses \$ \_\_\_\_\_

Supplies \$ \_\_\_\_\_

Legal, accounting and other professional fees \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Maintenance and repairs \$ \_\_\_\_\_

Salaries, wages and benefits \$ \_\_\_\_\_

Subcontractors \$ \_\_\_\_\_

Travel \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Private Health Plan Premiums \$ \_\_\_\_\_

Other Expenses \$ \_\_\_\_\_

Equipment/furniture purchases (**Please put on reverse**)

Registered for HST?  YES  NO

If yes, do the above figures include HST? \_\_\_\_\_

Automobile \_\_\_\_\_ SEE ACROSS

Home office \_\_\_\_\_ SEE BELOW

## Employment Expenses

Please ensure that you have a signed T2200 (Declaration of Employment Conditions) available should you be asked by the government to substantiate this claim. Please provide us with a copy of this form.

### Expenses

Accounting, legal fees \$ \_\_\_\_\_

Advertising, promotion \$ \_\_\_\_\_

Meals/entertainment \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_

Parking \$ \_\_\_\_\_

Office supplies \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Is your employer registered for HST ? YES NO

Travel \$ \_\_\_\_\_

Supplies \$ \_\_\_\_\_

Other Expenses \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Automobile \_\_\_\_\_ SEE BELOW

Home office \_\_\_\_\_ SEE BELOW



## Automobile Expenses

Please ensure that you keep a log of kms driven in the year

Year/Make of Car: \_\_\_\_\_

Purchase Price \*\*\* \$ \_\_\_\_\_

Year Purchased \*\* \_\_\_\_\_

Total Kilometres driven in 2015 \_\_\_\_\_

Business or Employment Use % \_\_\_\_\_

### Expenses

### Total for 2015

Fuel \$ \_\_\_\_\_

Repairs \$ \_\_\_\_\_

Lease payments \$ \_\_\_\_\_

Car washes \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

License and registration \$ \_\_\_\_\_

Interest on loan to purchase vehicle \$ \_\_\_\_\_

Any per km flat allowance received \$ \_\_\_\_\_

Other expenses eg CAA membership \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\*\* If a vehicle was disposed of in the year, please provide details

\*\*\* If leased vehicle, please provide a copy of purchase/lease paperwork

## Home Office Expense



Business or Employment Use % \_\_\_\_\_

(percentage of house used for business or employment)

**Expenses** **Total for 2015**

Heat/Gas \$ \_\_\_\_\_

Hydro/Water \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Repairs and maintenance \$ \_\_\_\_\_

Mortgage interest \$ \_\_\_\_\_

Property taxes \$ \_\_\_\_\_

Rent \$ \_\_\_\_\_

Telephone \$ \_\_\_\_\_

Other \$ \_\_\_\_\_