



H. K. Accounting & Tax Services

Creativity, Passion, Commitment



Personal Information

- Social Insurance Number (SIN) _____
- Date of birth _____
- Information about spouse/common-law partner
Name/SIN/DOB _____
- Information about dependents
Name/DOB _____
Name/DOB _____
- Spouse and/or child net income amounts
- Marital Status: Married /Single/Common-Law/Widow
- Residency: Canadian Citizen/PR/Temporary
- Tuition transfer amount from spouse or child
- Last year's tax return
- Notice of Assessment from last year's return
- Total amount of instalment payments made to the CRA
- Other CRA correspondence

Income

- Employment income (T4)
- Self-employed business income (T2125, T5013, T4A)
- Interest, dividends, mutual funds (T3, T5, T5008)
- Rental income and expenses (T776)
- Old Age Security and CPP benefits (T4A-OAS, T4A-P)
- Pension and annuity income (T4A)
- RRSP and RIF income (T4RSP, T4RIF)
- Employment insurance benefits (T4E)
- COVID-19 benefits received (T4A)
- Social assistance payments (T5007)
- Workers' compensation benefits (T5007)
- Other income not reported on a slip (e.g. tips)
- RL-1 Employment and other income (QC only)

Other Information

- Sale of principal residence
- Sale or deemed sale of stocks, bonds or real estate
- RRSP deduction limit and unused amounts
- Tuition carry forward amounts
- Loss carry forward amounts
- Other carry forward amounts (donations, etc.)

Receipts

- RRSP contributions
- Employment expenses (T2200 signed by employer)
- Work-from-home expenses due to COVID-19 (T2200S)
- Tool expenses
- Union dues not included on your T4 slip
- Exams for professional certification
- Teacher's school supplies
- Childcare expenses
- Support payments paid or received
- Adoption expenses
- Disability tax credit for self or dependents
- Medical expenses
- Personal attendant/facility care expenses
- Charitable donations
- Northern residents deduction
- Digital News subscription expenses
- Political contributions
- Moving expenses
- Home accessibility expenses
- Home Buyers' Amount
- Tuition expenses
- Student loan interest amounts
- Tax-exempt scholarships