2022 PERSONAL INCOME TAX INFORMATION FORM

GRAHAM SCOTT ENNS LLP
CHARTERED PROFESSIONAL ACCOUNTANTS

* New Clients please provide a copy of previous year's Notice of Assessment and T1 General package

BASIC PERSONAL INFORMATION		
	CLIENT	**PARTNER**
Full Name		
Social Insurance Number *(if new)*		
Date of Birth *(if new)*		
Home Address *(if new or changed)*		
Current Marital Status		
Change in Marital Status in 2022?	YES NO	YES NO
Main Phone Number		
Additional Phone Number		
E-mail Address		
Do you have investment assets requiring a T1135 to be prepared?	YES NO	YES NO
Did you sell your home in 2022?	YES NO	YES NO
Did you work from home in 2022 due to Covid-19?	YES NO	YES NO
Please indicate how you would like to receive your personal tax return:	By Secure Portal to Email Address: In paper format	
Would like to use DocuSign for signature purposes? YES NO **If yes, provide emails on bottom of next page**		

INFORMATION OF SALE OF PRINCIPAL RESIDENCE *	
Address:	
Name of owners if different than above	
Year of acquisition	
Total Selling price	

* If you have a second property that that would also qualify as a principal residence please inform us.

INFORMATION ON DEPENDENTS IF NEW OR CHANGES				
Name of Dependent and Relationship	**Date of Birth**	**SIN**	**Net Income**	**Disability**
				Yes
				Yes
				Yes
				Yes

ADDITIONAL INFORMATION, COMPLETE IF NEW OR CHANGED

	Client		Partner	
Are you a Canadian Citizen?	Yes	No	Yes	No
Are you a US Citizen?	Yes	No	Yes	No
Are you a Citizen of another Country?	Yes	No	Yes	No
May we provide information to Elections Canada on your behalf?	Yes	No	Yes	No
Did you own Foreign Property with a cost > $100,000 during 2022?	Yes	No	Yes	No
Are you Self-Employed?	Yes	No	Yes	No
Do you think you might qualify for the Disability Tax Credit?	Yes	No	Yes	No
Did you purchase a home for the first time during 2022?	Yes	No	Yes	No
Did you make any RRSP withdrawals during 2022 under the Home Buyer's Plan?	Yes	No	Yes	No
Did you make any RRSP withdrawals during 2022 under the Lifelong Learning Plan?	Yes	No	Yes	No
If an individual is deceased, please enter date of death and complete the "Final Return and Estate Checklist"	Date: _____		Date: _____	

DocuSign   Graham Scott Enns LLP uses Docusign, accepted by the Canada Revenue Agency, to facilitate the process of obtaining e-signatures on certain documents. It can be used on any device. If you would like to use DocuSign, please provide an email address for each individual whose return we are completing:

2022 PERSONAL INCOME TAX CHECKLIST

CRA ASSESSMENTS

Previous year(s) Notice of Assessment

Tax instalments for Current Year

DEDUCTIONS

RRSP Contribution(s)*	Investment Counsel/Accounting Fees
Union and Professional Dues	Moving Expenses*
Child Care Expenses*	T2200 – Employment Expenses (Include List)
Child Care/Support payment Information	T2200S – Employment Expenses working at Home due
Interest and Carrying Charges	to Covid-19 (Include List)

PERSONAL INCOME

T4 – Employment Income	T4E – Employment Insurance
Other Employment Income	T4PS – Profit Sharing Plan
Self-Employment Income and Expenses (CPP/EI)	T4RSP – RRSP Income
Rental Income and Expenses	T4RIF – RRIF Income
T4A (OAS) – Old Age Security	T5007 – Social Benefits Payments
T4A (P) – Canada Pension Plan	RC62 – Universal Child Care Benefit
T4A – Pensions and Other	Foreign Pensions

TAX CREDITS

Adoption Expenses	Foreign Employment Income
Public Transit Pass	Charitable Donations*
T2202(A) – Tuition/Education Credit	Medical Receipts (less insurance reimbursements)*
T2201 – Disability Tax Credit	Private Travel/Medical Insurance Plan premiums paid
Caregiver/Disability Amount	First Time Home Buyer's Credit
Student Loan Interest	

INVESTMENT INCOME

T3 – Trust/Mutual Fund Income	Annual Statements (Mutual Funds/Securities)
T5 – Interest and Dividend Income	Trading Summaries (Securities)
T5008 – Securities	Capital Gain/Loss Summaries
T5013 – Partnership Income	Foreign Interest/Dividend Income

OTHER

Rent or Property Tax paid (low income & Seniors)

Tradesperson's Tool Expense

detailed information and/or official receipts required