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 If yes, date changed:	◯YES ◯NO If yes, date changed:
Main Phone Number	Type:	Type:
Additional Phone Number	Type:	Type:
E-mail Address		
Please indicate how you would like to receive your personal tax return:	☐ By Secure Portal to Email Address: Enter email for portal if different from above ☐ In paper format	
Would like to use DocuSign for signature purposes? ◯ YES ◯NO		
Do you have investment assets requiring a T1135 to be prepared?	◯YES ◯NO	◯YES ◯NO
Did you sell your home in 2022?	◯YES ◯NO If yes, complete the 'Information of Sale of Principal Residence' section below	◯YES ◯NO If yes, complete the 'Information of Sale of Principal Residence' section below
Did you work from home in 2022 due to Covid-19?	◯YES ◯NO # of Days worked at home: ________ T2200S completed?: ◯Yes ◯No	◯YES ◯NO # of Days worked at home: ________ T2200S completed?: ◯Yes ◯No

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
May we provide CRA authorization to provide your name and email address to Ontario Health so that they may send you information about organ and tissue donation? **This is not consenting to organ and tissue donation.**	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: _____________

2022 PERSONAL INCOME TAX CHECKLIST

CRA ASSESSMENTS

- [ ] Previous year(s) Notice of Assessment
- [ ] Tax instalments for Current Year

DEDUCTIONS

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

PERSONAL INCOME

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

TAX CREDITS

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

INVESTMENT INCOME

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

OTHER

- [ ] Rent or Property Tax paid (low income & Seniors)
- [ ] Tradesperson’s Tool Expense

detailed information and/or official receipts required