

INCOME

- T4 EMPLOYMENT
- T4A PENSIONS
- T4A(OAS) OLD AGE SECURITY
- T4A(P) CANADA PENSION PLAN
- T4(RSP) RRSP
- T4(RIF) RIF
- T5007 WCB | SOCIAL ASSISTANCE
- T5008 TRADING TRANSACTIONS
- FOREIGN PENSION
- SELF-EMPLOYMENT SEE BUSINESS LIST
- RENTAL INCOME
- TIPS
- OTHER WORLD INCOME
- OTHER _____
- OTHER _____
- OTHER _____

EXTRA INFO MAY BE REQUIRED FOR T5008 SLIPS. WE WILL ADVISE AT TIME OF INTAKE

INVESTMENT INCOME

- T5 INVESTMENT
- T3 TRUST
- CAPITAL GAINS
- CAPITAL LOSSES
- OTHER _____

DEDUCTIONS

- RRSP CONTRIBUTIONS
- DONATIONS CHARITABLE | POLITICAL
- MEDICAL PRESCRIPTIONS | DENTAL | ETC
- EXTENDED HEALTH INSURANCE | TRAVEL
- EMPLOYMENT EXPENSES T2200 REQUIRED
- TUITION FEES T2202A REQUIRED
- STUDENT LOAN INTEREST
- UNION | PROFESSIONAL DUES
- MOVING EXPENSES SEE MOVING LIST
- DISABILITY TAX CREDIT
- OTHER _____
- OTHER _____
- OTHER _____

RENTAL INCOME INFO

- RENT _____
- NUMBER OF MONTHS _____
- UTILITIES _____
- MAINTENANCE _____
- MORTGAGE INTEREST _____

EXTRA INFO MAY BE REQUIRED WE WILL ADVISE AT TIME OF INTAKE

OTHER INFO

- PRIOR YEAR RETURN | NOA
- INSTALLMENT PAYMENTS IF APPLICABLE
- DIRECT DEPOSIT IF APPLICABLE