

207-3300 McNicoll Avenue, Toronto (416) 332-8458

PERSONAL INFORMATION FOR INCOME TAX RETURN FOR THE YEAR _____
(PLEASE WRITE IN CAPITAL LETTERS)

	Your Information	Spouse Information
Given Name		
Last Name		
SIN		
Date of Birth (yr/mmm/dd)		
Canadian Citizen Election Canada	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Common law <input type="checkbox"/> Widowed <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Single <input type="checkbox"/> Status Change Date _____		
Home Address:		
Previous Address (If Moved during the year)		Date Moved
Home Phone #	Cell Ph. #	Email:
Prop Tax <input type="checkbox"/> Rent <input type="checkbox"/> (annual) \$	Landlord/Municipality:	Date moved to Canada

DEPENDENT'S INFORMATION

<u>NAME</u>	<u>Date of Birth</u>	<u>Relation</u>	<u>S.I.N.</u>	<u>Child Care Expenses</u>
				\$
				\$
				\$

Child Care Expenses Paid to:
(Give name of Organization or name of Individual with SIN)

INFORMATION SLIPS: (PLEASE CIRCLE)

	T4	T4 A	T4 E	T4 AP	T4 (OAS)	T4 RSP	T5	T3	RSP SLIP	T 5007	T2200	T2202 A	T MED	T DON	Bus Pass			
# Of Slips (Self)																		
# Of Slips (Spouse)																		

During last year, did you receive Ontario Senior Homeowners' Property Tax Grant? Yes (give amount) \$ _____ No
 During last year, did you own foreign property costing more than \$100,000.00? Yes (give details) No

- ☛ IF YOU HAVE PROPERTY RENTAL INCOME - COMPLETE SECTION 'A' ON PAGE 2
- ☛ IF YOU ARE SELF-EMPLOYED - COMPLETE SECTION 'B' & 'C' ON PAGE 2
- ☛ IF YOU OPERATE A HOME OFFICE - COMPLETE SECTION 'D' ON PAGE 2

I/WE certify that the above information is true and correct and understood that my/our tax return is prepared based on the information provided by me/us. The accounting office, the accountant and his staff is not in any way responsible for incorrect/incomplete information and has prepared tax return without audit/verification/review of the information provided.

SIGNED BY: You _____ Spouse _____
 Date _____ Date: _____

YOU MAY FAX THIS FORM AT 416-640-2312 OR EMAIL TO GURMEET@GURMEETARORA.COM

A	Rental Statement		B	Statement of Business Activities	
		Amount			Amount
1	Rental income(Gross)		1	Gross income business/commissions	
2	Advertising for rent		2	Purchases / materials	
3	Insurance - Property		3	Advertising	
4	Interest (Mortgage)		4	Meals / entertainment	
5	Interest (Other)		5	Legal and Accounting fees	
6	Maintenance and Repairs		6	Delivery, freight etc.	
7	Condo fee		7	Utilities (Heat/Hydro/Water)	
8	Property taxes		8	Insurance - Business/ Professional	
9	Utilities (Heat/ Hydro/ Water)		9	Interest on business loan	
10	Legal and Accounting fees		10	Maintenance and repairs for business	
11	Other expenses (explain)		11	Management and administration fees	
			12	Office expenses	
			13	Supplies	
			14	Licence fees	
C	Automobile Expenses & Information		15	Rent	
	Information		16	Salaries, wages, and benefits (including	
1	Make of the vehicle			employer's contributions)	
2	Year bought		17	Travel	
3	Price of the vehicle		18	Telephone	
4	Total KM during the year		19	Other expenses (explain)	
5	KM driven for business		20		
	Automobile Expenses	Amount	21		
1	Gas		22		
2	Repairs		23		
3	Insurance		24	Office furniture	Year bought
4	Licence		25	Office equipment	Year bought
5	Car washes		26	Computer	Year bought
6	407 ETR Toll		D	Business use of home expenses	
7	Parking			Information	
8	Dispatch fee (for taxi drivers)			Total area of the house/ sq.ft	
9	Lease payments			Area used for business/ sq.ft.	
10	Interest on vehicle loan			Expenses	Amount
			1	Utilities (Heat/Hydro/Water)	
			2	Insurance	
			3	Maintenance	
			4	Mortgage interest	
			5	Property taxes	
			6	Other expenses (explain)	
			7	Rent (if renting)	
			8		

Note: You are required to keep receipts/invoices and/or logbook for verification by Revenue Canada, if required

The list of documents required for filing personal tax returns as applicable:

- Attached Tax Information Form (mandatory update each year)
- Any receipt or document says it is for Tax or Income Tax purposes,
- Last year's Notice of Assessment, Reassessment or Tax return,
- Tax installment payments
- HST Return code, if applicable
- T4, T4A, T4E, T4AP, T4(OAS), T4RSP, T4RIF, T-5013
- T5, T3 for investment / interest income,
- T5007 – statement of benefits,
- T5008- Sales of securities and book value
- Investment trading summary with book value
- T2202 A– Tuition receipt,
- Property tax or rent paid receipt or annual statement,
- RRSP contribution receipts,
- Charitable Donation receipts,
- Political donation receipts
- T2200 – Deduction of employment expense from income, please fill details of expenses on page-2 of Tax Info form,
- Medical expenses receipts (including plan premium),
- Investment loan interest,
- Child care expenses receipts,
- Student loan interest receipt,
- Professional or union dues receipts
- If you sold real estate during the year including principal residence, details are required.
- If you have any **rental property**, please fill details in section 'A' on page-2 of Tax Info form,
- If you have any **self-employed income**, please fill details in section 'B' & 'C' on page-2 of Tax info form,
- If you are **operating a home office**, please fill details in section 'D' on page-2 of Tax info form.