
PERSONAL TAX PACKAGE

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SUBMITTING DOCUMENTATION ELECTRONICALLY

- Consolidate information in as few files as possible and organize by type (e.g., income slips, donation receipts, etc.)
- Submit all documents at the same time.
- Upload documents via our secure, web-based portal. If you do not have the portal, request one via email: info@ysaccountingtax.ca

SUBMISSION DEADLINES

- **April 30th** – Tax Return for Individuals
- **June 15th** – Tax Return for Self-Employed

CHECKLIST

Your Name

Tax Year

TO ASSIST IN THE PREPARATION OF YOUR TAX RETURN, PLEASE COMPLETE THIS FORM AND ATTACH THE SUPPORTING DOCUMENTATION. WE CAN NOT BEGIN PROCESSING YOUR RETURN UNTIL WE HAVE ALL THE REQUIRED INFORMATION.

PLEASE KEEP YOUR RECORDS FOR SIX YEARS FROM THE END OF THE TAXATION YEAR TO WHICH THEY RELATE.

- ☐ Fill in section about you/your family (pages)
- ☐ Answer the foreign asset questions (page)
- ☐ Include slips for all DOCUMENTED income

Employment/self-employment

- ☐ T4 – Employment income
- ☐ T4A – Self-employment, scholarship, grants
- ☐ T1204 – Government services contract payments
- ☐ T5018 – Contract payments

Retirement

- ☐ T4A – Pension, annuities
- ☐ T4A (OAS) – Old Age Security
- ☐ T4A (P) – Canada Pension Plan
- ☐ T4A-RCA – RCA income
- ☐ T4RSP - RRSP income
- ☐ T4RIF – RRIF income
- ☐ Form SSA-109910425 – US Social Security

Investments

- ☐ T3 – Mutual funds, REITS, ETFs
- ☐ T5 – Investment income, royalties
- ☐ T5013 – Partnership income
- ☐ T5008 or detailed gain/loss report from broker (securities transactions)
- ☐ Monthly or quarterly investment statements

Government benefits

- ☐ T4E -EI and maternity, parental leave benefits
- ☐ T5007 - Worker's compensation, social assistance

- ☐ T4A – Scholarships, grants

☐ List all NON-DOCUMENTED income (pages)

- ☐ Self-employment
- ☐ Tips
- ☐ Foreign income/pensions
- ☐ Interest
- ☐ Investment gains/losses
- ☐ Rental property/sale of your home
- ☐ Child/spousal payments received

☐ Provide information about payments (pages)

- ☐ Tax installments
- ☐ Home Buyer's repayments
- ☐ RRSPs
- ☐ Child/spousal support paid

☐ Include receipts/documentation supporting deductions/credits

- ☐ Adoption expenses
- ☐ Charitable donations
- ☐ Childcare expenses
- ☐ Fees paid to the financial advisor
- ☐ Disability Tax Credit Certificate (Form T2201)
- ☐ Employment expenses (forms T2200, GST370)
- ☐ Home accessibility improvements (seniors, those eligible for the disability tax credit)
- ☐ Interest paid to earn investment income
- ☐ Legal fees to collect salary/wages /child support

- ☐ Medical/dental/attendant care expenses
- ☐ Moving expenses
- ☐ Work from home expenses
- ☐ Political contributions
- ☐ Public transit passes (seniors only)
- ☐ Rent/property tax
- ☐ RRSP contributions (Mar-Dec 2020, Jan-Feb 2021)
- ☐ Spousal support
- ☐ Student loan interest
- ☐ Teaching supplies purchased by teachers/ECEs
- ☐ Tuition (form T2202 or TL11A)
- ☐ Union/professional dues (not a T4)

☐ **Provide employment/self-employment information (pages)**

- ☐ Employment expense section (must have form T2200)
- ☐ GST/HST section
- ☐ Expense lists

☐ **Submit documentation**

- ☐ Privacy policy (new clients only)
- ☐ Authorization Request Signature Page (new clients only)
- ☐ Your previous year's tax return (new clients only)
- ☐ Spouse's tax return, if not prepared by our office
- ☐ Foreign tax returns or tax slips, if taxes are paid in another country
- ☐ Your GST/HST returns, if not prepared by our office
- ☐ Foreign securities report

☐ **If we do your bookkeeping, submit Jan – Dec 2021**

- ☐ Business bank statements (attached cancelled cheques, but no receipts)
- ☐ Business credit card statements (but no receipts)
- ☐ Cash receipts

ABOUT YOU

FOR NEW CLIENTS AND RETURNING CLIENTS, PLEASE NOTE ANY CHANGES.

Name

Date of Birth

SIN

Email

Address

City

Province

Postal Code

Primary phone number

Occupation

NEW CLIENTS, PLEASE

- ☐ Complete, sign and return our **Privacy Policy**
- ☐ Complete, sign and return the **Authorization Request Signature Page**

☐ Provide a copy of your previous year's tax return (including schedules)

CITIZENSHIP/RESIDENCY

ATTACH COPIES OF FOREIGN TAX RETURNS FILED AND/OR FOREIGN TAX SLIPS RECEIVED IN 2020

☐ Canadian citizen ☐ Other citizenship:

If you moved to or from Canada in 2021, indicate:

Date From To

MARITAL STATUS

☐ Single ☐ Common-law ☐ Married ☐ Separated ☐ Divorced ☐ Widowed

If marital status changes in 2021, provide the date

If our office does not prepare a spouse's return, please submit a copy (recommended) or provide:

Spouse's Name SIN

Date of Birth Net Income (line 236000)

DEPENDANT CHILD/CHILDREN

NAME	DATE OF BIRTH (YYYY/MM/DD)	SIN

☐ If separated/divorced, check here if custody is shared (each parent has the children 40% or more of the time)

COVID 19 EMERGENCY FUND RELIEF FUNDS

Did you receive CERB ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

Did you receive CRB ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

Did you receive CRCB ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

Did you receive CRSB ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

Did you receive CESB ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

Did you receive CEBA ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

Did you receive EI ☐ Yes ☐ No

Time periods collected

Amount collected in 2020

Amount re-paid

Time periods collected

Amount collected in 2021

Amount re-paid

INFORMATION FOR OUR OFFICE

How would you like to receive the client copy of your return?

- ☐ PDF via a secure portal (recommended)
- ☐ Emailed copy
- ☐ Printed copy

INFORMATION FOR CANADA REVENUE AGENCY

I am a Canadian citizen, and I authorize Canada Revenue Agency (CRA) to give my name, address, DOB and citizenship to Elections Canada to update the National Register of Electors

☐ Yes ☐ No

I authorize registration with CRA's online mail service

☐ Yes ☐ No ☐ Already registered

I authorize the office of YS Accounting and Tax Services, Inc. to access CRA's website to check my information on file

***** New clients: please complete, sign and return the Authorization Request Signature Page, authorizing our office as your representative for income tax matters**

☐ Yes ☐ No

DIRECT DEPOSIT INFORMATION (NEW/UPDATED INFORMATION ONLY)

The manage direct deposit service is currently unavailable to us. Here are some other ways to manage your direct deposit:

- Through your Canadian financial institution
- Through CRA's MyAccount
- Or by calling 1-800-959-8281

More information about those options is available on the [Direct Deposit](#) main page.

FOREIGN ASSETS

During 2020, did you hold bank accounts, investments, investment real estate, or other assets outside Canada that initially cost \$100,000 CDN (aggregate)?

Note: this includes shares of foreign corporations (e.g. Apple, Microsoft) held in Canadian investment accounts, but NOT Canadian mutual funds that hold US securities.

☐ Yes ☐ No ☐ Not sure - please contact me

*** If yes, you must file [form T1135](#). Late filing penalties (up to \$2,500) are strictly enforced by CRA.

☐ I would like your office to submit the T1135 form on my behalf with the tax return

☐ I am submitting a foreign securities report from my broker/financial institution

INCOME

DOCUMENTED INCOME

INCOME FOR WHICH OFFICIAL TAX SLIPS WERE RECEIVED (E.G. T4s, T4As, ETC.)

Include income from employment, investments, retirement, etc. See the checklist on pages 2 – 3, and submit all slips received.

NON-DOCUMENTED INCOME

INCOME FOR WHICH NO OFFICIAL TAX SLIPS WERE RECEIVED.

Includes self-employment, per diems, tips, foreign income/pensions, interest, etc. Attach additional sheets as needed.

PAYOR	INCOME TYPE	EARNINGS	INCLUDES HST (Y, N, N/A)

RENTAL PROPERTY

IF YOU OWN RENTAL PROPERTIES, ATTACH THE FOLLOWING COPIES:

- ☐ Monthly bank statements
- ☐ Property purchase agreement
- ☐ Property sale agreement
- ☐ Statement of adjustments & trust ledger statement
- ☐ Completed rental income and expenses spreadsheet

SUPPORT RECEIVED

Child support \$

Spousal support \$

Agreement is: ☐ pre '97 ☐ post '97

Received from:

DEDUCTIONS AND CREDITS

SUBMIT RECEIPTS/SUPPORTING DOCUMENTATION

- ☐ Adoption expenses
- ☐ Charitable donations
- ☐ Childcare expenses
- ☐ Fees paid to financial advisors (non-registered investments only)
- ☐ Disability tax credit (form T2201)
- ☐ Foreign taxes paid (include foreign tax return and / or tax slips indicating final tax liability)
- ☐ Home accessibility improvements (seniors and those eligible for the disability tax credit)
- ☐ Interest paid to earn investment income (non-registered investments only)
- ☐ Legal fees to collect salary/wages/child support (include receipt(s))
- ☐ Medical/dental/attendant care expenses
- ☐ Moving expenses (moves of at least 40KM for a new job or business or to attend post-secondary school)
- ☐ Moving expenses (moves of at least 40KM for a new job or business or to attend post-secondary school)
- ☐ Work from home expenses (must obtain from your employer a signed Form T2200, and home must be your principal space to perform your job at home)
- ☐ Political contributions
- ☐ Public transit (seniors only)
- ☐ RRSP contributions (Mar-Dec 2021 and Jan-Feb 2022)

- ☐ Student loan interest
- ☐ Teaching supplies purchases by teachers / ECEs
- ☐ Tuition (form T2202A or TL11A)
- ☐ Union/professional dues (not on a T4)
- ☐ Digital news subscription expenses

FIRST TIME HOME BUYERS' TAX CREDIT

Address of property

Acquisition date

Co-owner/s of the property, if applicable

ONTARIO TRILLIUM BENEFIT (RENT/PROPERTY TAX CREDIT)

NOTE: One partner/spouse must claim the full amount. Seniors may qualify for the Ontario Senior Tax Credit.

ONTARIO ADDRESS	RENT/PROPERTY TAXES PAID	# MONTHS	PAID TO

- ☐ I am submitting receipts for rent and/or property taxes paid (recommended)

PAYMENTS

INSTALLMENTS

Total personal tax installments paid directly to CRA (NOT taxes withheld on slips) for the 2021 tax year \$

HOME BUYERS' RRSP REPAYMENT

Year withdrawn

Amount withdrawn \$

Amount paid back in 2021 \$

SUPPORT PAID

Child support \$

Spousal support \$

Agreement is: ☐ pre '97 ☐ post '97

Paid to :

EMPLOYMENT EXPENSES (MUST HAVE FORM T2200)

I worked from home in 2021 due to COVID-19 ☐ Yes ☐ No Number of days

I am T4 employee eligible to claim employment expenses ☐ Yes ☐ No

If yes:

☐ I am submitting form T2200 (Declaration of Conditions of Employment) form/s signed by my employer

☐ I am submitting form GST370 (Employee and Partner GST/HST Rebate Application) form signed by the employer

☐ I have listed all employment expenses in the tables on page 10 (note: expenses must fall within categories listed on forms T2200/GST370)

GST/HST

ANNUAL FILERS WHO OWE \$3,000 IN GST/HST AT LEAST MUST REMIT QUARTERLY INSTALMENTS; OTHERWISE, CRA WILL CHARGE INSTALLMENT INTEREST BASED ON THE EXPECTED QUARTERLY PAYMENT DUE DATES.

Are you registered for GST/HST ☐ Yes ☐ No

Please file my GST/HST return (charge applicable) ☐ Yes ☐ No (submit most recent return/s filed)

If yes:

☐ Annual filer ☐ Quarterly filer

Method of accounting:

☐ Regular ☐ Quarterly

GST/HST Number

GST/HST collected \$ GST/HST installments paid for 2021

Did you work outside Ontario in 2021 or in prior years? ☐ Yes ☐ No

If yes, please comment:

EMPLOYMENT/SELF EMPLOYMENT EXPENSES

IF OUR OFFICE DOES YOUR BOOKKEEPING, LEAVE THIS SECTION BLANK AND REFER TO THE CHECKLIST ON PAGES 2 AND 3 FOR A LIST OF DOCUMENTATION TO SUBMIT.

AUTOMOBILE

THE BEST PRACTICE IS TO MAINTAIN A MILEAGE LOG FOR BUSINESS-RELATED DRIVING

Make	Model	Year
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Total distance driven during year

Distance driven for business

Cost if bought during the year (including GST/HST) \$

Date vehicle purchased/leased

☐ Copy of vehicle purchase agreement

☐ Copy of vehicle lease agreement

AUTO EXPENSES	FULL AMOUNT PAID – INCLUDE GST/HST; DO NOT PRO-RATE
Gas and oil	\$
Car loan interest	\$
Insurance	\$
License and registration	\$
Maintenance and repairs	\$
Lease payments	\$
Other – specify:	\$
Business parking	\$

BUSINESS USE-OF-HOME

Square footage – Whole house .

Square footage – Office only

HOME EXPENSES	FULL AMOUNT PAID – INCLUDE GST/HST; DO NOT PRO-RATE
Heat	\$
Electricity	\$
Insurance	\$
Maintenance and repair	\$
Mortgage (annual interest portion only)	\$
Property taxes	\$
Municipal Utilities (water, garbage, etc.)	\$
Other – specify:	\$
Rent	\$

ADDITIONAL EXPENSES

AMEND CATEGORIES AS NEEDED; INCLUDE BUSINESS PORTION ONLY	FULL AMOUNT PAID – INCLUDE GST/ HST
Advertising, promotion, gifts	\$
Business meals and entertainment *Note – these items are 50% deductible for tax purposes	\$
Bank/credit interest and service charges	\$
Association dues and fees	\$
Office and stationery	\$
Materials and supplies	\$
Accounting and legal	\$
Agent commissions, management fees	\$
Office or studio rental (NOT home office)	\$
Repair and maintenance	\$
Travel and lodging – within Canada	\$
Travel and lodging – outside Canada	\$
Travel meals and entertainment within Canada *Note – these items are 50% deductible for tax purposes	\$

Travel meals and entertainment outside Canada *Note – these items are 50% deductible for tax purposes	
Telephone (business portion only)	\$
Internet, cable, streaming services (business portion only)	\$
Professional development (coaching, classes, workshops, etc.)	\$
Research (music, theatre, books, etc.)	\$
Local transportation – TTC and other public transit	\$
Local transportation – other (taxis, Uber, car rentals, etc.)	\$
Professional publications and subscriptions	\$
Professional services	\$
Health insurance premiums	\$
Equipment – list:.	\$
Other – specify:	\$
Total	\$