

### Your 2009 Income

Check if you have any of the following income items:

Item	Slips to Bring
<input type="checkbox"/> Employment income	T4
<input type="checkbox"/> Taxable disability income	T4A
<input type="checkbox"/> Profit sharing income	T4PS
<input type="checkbox"/> Commission income	T4 or T4A
<input type="checkbox"/> Old Age Security income	T4A
<input type="checkbox"/> Canada Pension Plan income	T4AP
<input type="checkbox"/> Other pension/annuity income	T4A
<input type="checkbox"/> RRSP income	T4RSP
<input type="checkbox"/> RRIF income	T4RIF
<input type="checkbox"/> Withdrawals from RRSP	T4RSP
<input type="checkbox"/> EI Benefits	T4E
<input type="checkbox"/> Worker's Compensation (WSIB)	T5007
<input type="checkbox"/> Social assistance payments	T5007
<input type="checkbox"/> Dividend income	T3s and T5s
<input type="checkbox"/> Interest income	T5s
<input type="checkbox"/> Limited partnership income	T5013
<input type="checkbox"/> Rental property income	See next page
<input type="checkbox"/> Sale of real estate	See next page
<input type="checkbox"/> Sale of non-RRSP stocks	See next page
<input type="checkbox"/> Sale of non-RRSP mutual funds	See next page
<input type="checkbox"/> Self-employed income	See back page
<input type="checkbox"/> Alimony income	\$ _____
<input type="checkbox"/> Other income:	\$ _____
	\$ _____
	\$ _____
	\$ _____

If extra slips are received after filing, there may be a service charge to adjust the return.

### Your 2009 Deductions/Credits

Check if you have any of the following: Please include receipts.\*



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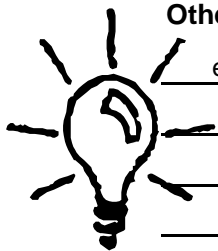
Item	Amount
<input type="checkbox"/> Charitable donations *(only official donations)	\$ _____
<input type="checkbox"/> Political party contributions	\$ _____
<input type="checkbox"/> Labour-sponsored fund contributions	\$ _____
<input type="checkbox"/> RRSP contributions	\$ _____
<input type="checkbox"/> Moving expenses (in some circumstances)	\$ _____
<input type="checkbox"/> Tuition fees for yourself	\$ _____
<input type="checkbox"/> Children's / spouse's tuition fees (post secondary tuition only)	\$ _____

Please note amount and ensure that you have the receipts to support the following items: (If unsure, attach receipts)

<input type="checkbox"/> Employment expenses	see back page
<input type="checkbox"/> Alimony payments made	\$ _____
<input type="checkbox"/> Disability amount	\$ _____
<input type="checkbox"/> Medical expenses (out of pocket amounts)** <small>(include any medical insurance paid by you)</small>	\$ _____
<input type="checkbox"/> Rent paid	\$ _____
<input type="checkbox"/> Property taxes paid	\$ _____
<input type="checkbox"/> Safety deposit box charges	\$ _____
<input type="checkbox"/> Legal fees for investment loan	\$ _____
<input type="checkbox"/> Investment loan interest	\$ _____
<input type="checkbox"/> Quarterly tax instalments paid to the government (these are not found on any T-slips)	\$ _____
<input type="checkbox"/> Union dues, professional fees	\$ _____
<input type="checkbox"/> Child care expenses	\$ _____
<input type="checkbox"/> Other <small>e.g Transit passes and childrens fitness credits</small>	\$ _____

\* If there is a **discrepancy** between the figures above and the receipts provided, we will use the total of the receipts provided.  
\*\* Do not include any **medical amounts** paid by insurance companies or paid by the Ontario Government etc, only amounts paid by you (and not reimbursed by anyone).

### Other information you would like to tell us about.



e.g. Did you have any home renovations for 2009? Are you a first time home buyer in 2009?

**If you are not sure we'll need it, bring it along!**

## Rental Property Income & Expenses



Address \_\_\_\_\_  
 Joint owner \_\_\_\_\_  
 Jt. Ownership % \_\_\_\_\_

Income (rent collected) \$ \_\_\_\_\_

### Expenses

Advertising \$ \_\_\_\_\_  
 Insurance \$ \_\_\_\_\_  
 Mortgage Interest \$ \_\_\_\_\_  
 Repairs \$ \_\_\_\_\_  
 Property Taxes \$ \_\_\_\_\_  
 Salaries \$ \_\_\_\_\_  
 Utilities \$ \_\_\_\_\_  
 Condo Fees \$ \_\_\_\_\_  
 Other Expenses \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 Major renovations & purchases (ie. Appliances)  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

*If the property was purchased in the year, please provide the details.*

## Sale of Real Estate (excluding personal residence)



Address \_\_\_\_\_  
 \_\_\_\_\_

Date Sold \_\_\_\_\_

Joint owner \_\_\_\_\_

Jt. Ownership % \_\_\_\_\_

Date Purchased \_\_\_\_\_

Purchase price \$ \_\_\_\_\_

Legal costs on purchase \$ \_\_\_\_\_

Additions / major improvements:  
 \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Sale Price \$ \_\_\_\_\_

Legal costs on sale \$ \_\_\_\_\_

Commissions paid on sale \$ \_\_\_\_\_

Other selling expenses \$ \_\_\_\_\_

## Sale of Non-RRSP Stock (please provide broker's receipts for both the purchase and the sale)

Name of Stock	Date Sold (dd/mm/yy)	Number of Shares	Sale* Price	Purchase* Price	Commissions Paid

\* Price per share

## Sale or Transfer of Non-RRSP Mutual Funds (including systematic withdrawal programs)

Please provide the December 31, 2009 year end statements for all of your non-RRSP mutual funds. These statements were sent to you by the mutual fund companies in early 2010. The statements show all transactions for 2009, including any sale, redemption or transfer of your shares in the mutual fund during the year.

List all of your mutual funds that had shares sold or transferred during 2009.

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



# Self-Employed Income & Expenses

Name of Business \_\_\_\_\_

Type of Business and address if different from home \_\_\_\_\_

Joint Owner and % \_\_\_\_\_

**Income** \$ \_\_\_\_\_

**Expenses**

Advertising \_\_\_\_\_ \$ \_\_\_\_\_

Licenses, dues, fees \_\_\_\_\_ \$ \_\_\_\_\_

Insurance \_\_\_\_\_ \$ \_\_\_\_\_

Interest/bank charges \_\_\_\_\_ \$ \_\_\_\_\_

Meals/entertainment \_\_\_\_\_ \$ \_\_\_\_\_

Office supplies \_\_\_\_\_ \$ \_\_\_\_\_

Legal & accounting \_\_\_\_\_ \$ \_\_\_\_\_

Rent \_\_\_\_\_ \$ \_\_\_\_\_

Salaries \_\_\_\_\_ \$ \_\_\_\_\_

Telephone \_\_\_\_\_ \$ \_\_\_\_\_

Other expenses \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Equipment/furniture purchases (if you need more space, attach list) \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Registered for GST?  YES  NO

If yes, do the above figures include GST? \_\_\_\_\_

Automobile \_\_\_\_\_ SEE ACROSS

Home office \_\_\_\_\_ SEE BELOW



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# Employment Expenses

Please ensure that you have a **signed T2200 (Declaration of Employment Conditions)** available should you be asked by the government to substantiate this claim. Please provide us with a copy of this form.

**Expenses**

Accounting, legal fees \_\_\_\_\_ \$ \_\_\_\_\_

Advertising, promotion \_\_\_\_\_ \$ \_\_\_\_\_

Meals/entertainment \_\_\_\_\_ \$ \_\_\_\_\_

Lodging \_\_\_\_\_ \$ \_\_\_\_\_

Parking \_\_\_\_\_ \$ \_\_\_\_\_

Office supplies \_\_\_\_\_ \$ \_\_\_\_\_

Telephone \_\_\_\_\_ \$ \_\_\_\_\_

Is your employer registered for GST ?  YES  NO

Other expenses: \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Automobile \_\_\_\_\_ SEE BELOW

Home office \_\_\_\_\_ SEE BELOW



# Automobile Expenses

Please ensure that you keep a log of kms driven in the year  
Year/Make of Car: \_\_\_\_\_

Purchase Price \*\*\* \_\_\_\_\_ \$ \_\_\_\_\_

Year Purchased \*\* \_\_\_\_\_

Total Kilometres driven in 2009 \_\_\_\_\_

Business or Employment Use \_\_\_\_\_ %

**Expenses**

**Total for 2009**

Fuel \_\_\_\_\_ \$ \_\_\_\_\_

Repairs \_\_\_\_\_ \$ \_\_\_\_\_

Insurance \_\_\_\_\_ \$ \_\_\_\_\_

Licensing \_\_\_\_\_ \$ \_\_\_\_\_

Loan interest \_\_\_\_\_ \$ \_\_\_\_\_

Lease payments (per month & annual amount) \_\_\_\_\_ \$ \_\_\_\_\_

CAA membership \_\_\_\_\_ \$ \_\_\_\_\_

Any per km flat allowance received \_\_\_\_\_ \$ \_\_\_\_\_

Other expenses \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\*\* If a vehicle was disposed of in the year, please provide details

\*\*\* If leased vehicle, please provide a copy of purchase/lease

# Home Office Expense

Business or Employment Use \_\_\_\_\_ %

(percentage of house used for business or employment)

**Expenses**

**Total for 2009**

Heat \_\_\_\_\_ \$ \_\_\_\_\_

Hydro \_\_\_\_\_ \$ \_\_\_\_\_

Water \_\_\_\_\_ \$ \_\_\_\_\_

Insurance (self-employed or commissioned only) \_\_\_\_\_ \$ \_\_\_\_\_

Maintenance, repairs \_\_\_\_\_ \$ \_\_\_\_\_

Mortgage Interest (self-employed only) \_\_\_\_\_ \$ \_\_\_\_\_

Prop. taxes / Rent (self-employed or commissioned) \_\_\_\_\_ \$ \_\_\_\_\_

Other \_\_\_\_\_ \$ \_\_\_\_\_

