Instructions: **Please complete this checklist and return it to Yvonne Sulentic, Inc. with your personal income tax information (slips and receipts, etc.)**

Name: ______________________________

Social Insurance Number: ______________________________

Address: (if different from last year)

Street ______________________________

City, Province ______________________________

Postal Code ______________________________

Telephone: ______________________________

Birth date: ____________________

Province of Residence on December 31, 2019: ____________________

Email address: ____________________

(By providing your e-mail address or updating an already registered email address on your tax return, you will be registered for online mail with the CRA. Paper notices will not be mailed to you from the CRA)

Are you a Canadian Citizen? **Yes** ☐ **No** ☐

Canadian citizens only:

"Do you authorize the Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?" **Yes** ☐ **No** ☐

Do you wish to start direct deposit or to change account information for your tax refund? **Yes** ☐ **No** ☐
(If yes, attach a "void" personalized cheque or provide your financial institution name, branch and account number)

Marital Status: Single ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐ Common-Law ☐

Information about spouse or common-law partner (if Yvonne Sulentic, Inc. is not preparing return of spouse or common-law partner)**:**

Name: ______________________________

SIN Number: ______________________________

Birth date: ____________________

Net Income: $ ____________________

Is your spouse self-employed? **Yes** ☐ **No** ☐

For taxpayers who received pension income in 2019, do you wish to split pension income with your spouse?

Yes ☐ **No** ☐

Dependents:

Name	**Birth Date**	**Net Income** (if any)	**S.I.N.** (if applicable)

Please ensure the following information is forwarded to us as soon as available: **Check if Information Attached**

1. All information slips:

Employment	T4, T4A	☐
Interest	T5	☐
Dividends	T5	☐
Mutual Funds and Other Trusts	T3	☐
Old Age Security	T4A (OAS)	☐
Canada Pension	T4A (P)	☐
Employment Insurance	T4E	☐
Income from RRSP or RRIF	T4RSP; T4RIF	☐
Purchase and Sale of Securities	T5008	☐
Partnership income	T5013	☐
Pension or Disability Payments	T4A	☐
Social Assistance, Workers Compensation	T5007	☐
Apprenticeship Incentive Grant	T4A (Box 28)	☐
Other, including Foreign Slips		☐

2. All official receipts: **Check if Information Attached**

Registered Retirement Savings Plan Contributions	☐
Charitable Donations	☐
Political Donations	☐
Professional or Union Dues	☐
Tuition Fees: (**T2202/2202A/TL11A***)	☐

***If receipt is for a dependant, please have dependant sign in appropriate place on the form.*

3. List of income and expenses for rental property. ☐
(Please fill out the Rental Properties Checklist on our website)

4. List of income and expenses from self-employment activities. ☐
(Please fill out the Self Employment Checklist on our website)

5. Details of employment expenses:
(In order to claim these expenses, employees must attach Form T2200 "Declaration of Conditions of Employment" signed by their employer.) ☐

Automobile Expenses
Note: If more than one vehicle is used for business purposes, provide a separate listing of expenses.

Cost of vehicle, if purchased in the year (attach invoice)		$______________
Proceeds received on disposal of old vehicle, if applicable		$______________
Gas and oil		$______________
Repairs and maintenance		$______________
Insurance		$______________
License		$______________
Total kilometers driven for the year	______________	
Business kilometers driven for the year	______________	

***** Please note that in order to substantiate your automobile expenses you are required to keep a travel log for the year. The log should indicate the date, destination to and from, and the business purpose of each trip. Commuting between your home and your regular place of work is not considered business travel.***

Office-in-the-home-expenses

Measurements

Square footage of entire house ______________ sq. ft.

Square footage of room used for office ______________ sq. ft.

Expenses

Utilities (heat, water, electricity) $__________________

Insurance (*note: commission employees only*) $__________________

Maintenance $__________________

Property tax (*note: commission employees only*) $__________________

Other (please specify: __________ $__________________

Other (please specify: __________ $__________________

6. **Family Expenses:**

Amount of support payments or alimony payments paid or received and $______________

name and address of payor/recipient ____

Child care expenses (attach receipts from Daycare or Summer Camps) $______________

Adoption Expenses $______________

7. **Investments**

- Listing of investments on which accrued interest is required to be reported and for which a tax reporting form has not been received $______________
- Carrying charges and interest paid to earn income from investments (including investment counsel fees; but safety deposit box fee is no longer qualified as carrying charges starting 2014) $______________
- Details on disposition of capital property (stocks, mutual funds, or other properties) Provide original purchase cost, sales proceeds and expenses on disposition $______________
- Disposition of real property (original purchase date and cost, sales date, proceeds and expenses on disposition), including sale of your principal home. (If you changed the use of a real property, e.g. convert all or part of your principal residence to a rental or business operation or vice versa, it is considered a deemed disposition and needs to be reported.) $______________

8. **Other items:**

- Any other income received during the year
  Please provide amounts and description ____ $______________
- Professional Dues or Membership fees $______________
- Form T1212 – Statement of Deferred Stock Options Benefits $______________
- Amount of lifelong learning plan withdrawal or home buyer's plan withdrawal from your RRSP in the year $______________
- Amount of RRSP contribution designated as loan repayment of a prior year loan $______________
- Amount of interest paid on student loans $______________

- Amount of medical expenses paid personally (For self, spouse or dependent). $______________
- Details regarding eligible moving expenses____ $______________
- Are you entitled to a disability amount for yourself or a dependant? Yes ☐ No ☐
- Are you entitled to a disability supports deduction amount for yourself or a dependant? Yes ☐ No ☐
- If you or your dependant are eligible for the disability tax credit, or if you or your dependant are 65 years of age or older at the end of the year, did you incur renovation expenses to your owned home to allow you or your dependant to gain access to; to be mobile or functional or to reduce the risk of harm to you or your dependant within the dwelling? (tax credit available) Yes ☐ No ☐
- Are you a first-time home buyer? (tax credit available) Yes ☐ No ☐
- If you are an eligible educator, did you buy teaching supplies in the year (refundable tax credit available) Yes ☐ No ☐
- Did you complete an eligible program administered by BC Industry Training Authority in the year (refundable BC Training tax credit available) Yes ☐ No ☐
- Amount of instalment payments made for the year (attach statement) $______________

9. **Are you a U.S. citizen or do you hold a valid U.S. green card? *** Yes ☐ No ☐
*If you are a U.S. citizen or hold a valid U.S. green card you are required to file a U.S. income tax return and may be required to file certain U.S. information returns. If you have not been filing any U.S. returns, please contact us immediately.

10. **Did you own foreign property at any time during the year, and the aggregate cost of which exceeded $100,000?**
(***If yes, there are foreign reporting requirements.) Yes ☐ No ☐