



# OLAFSON & JONES

## Personal Income Tax Information Sheet for Returning Clients

**FOR OFFICE USE ONLY:** Electronic file: Saved in Client Files/iFirm Client Portal      **DATE SUBMITTED:** \_\_\_\_\_

**CLIENT NAME(S):** \_\_\_\_\_

HOW MANY RETURNS ARE WE PREPARING?: \_\_\_\_\_      TAX YEAR(S): \_\_\_\_\_

### Primary Family Contact Information

**PRIMARY CONTACT NAME:** \_\_\_\_\_ **PHONE NUMBER:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**1) Has your primary residence changed in 2024?**     YES                       NO

If you answered yes, please provide:

Date of move: \_\_\_\_\_ Street Address \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Are you a first-time Home Buyer?    YES                      NO

If you owned previously: Sale price \$ \_\_\_\_\_ Original Year of purchase: \_\_\_\_\_

**2) Did you martial status change in 2024?**     YES                       NO

If you answered yes, please indicate the date of change: \_\_\_\_\_ New Martial Status: \_\_\_\_\_

**3) Did you have any children in 2024 or 2025?**     YES                       NO

If you answered yes, please provide the date of birth: \_\_\_\_\_

Full legal name: \_\_\_\_\_

**4) Did you work from home more than 50% of the time in 2024? If yes, please see page 2**     YES                       NO

**5) If you are self-employed (NOT incorporated) and registered to file G.S.T, are we preparing a return for you?**     YES                       NO

If you answered yes, please provide your access code (if applicable) and business number

Business number: \_\_\_\_\_ Access code: \_\_\_\_\_

**6) If you are married or common-law and we are NOT PREPARING your partner's return, please complete their information below:**

Full legal name: \_\_\_\_\_ SIN: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Taxable income for 2024: \$ \_\_\_\_\_

**7) At any time in 2024, did you hold foreign property with a value of over \$100,000?**     YES                       NO

*\*Includes foreign investments or foreign income producing properties\**

### HOW WOULD YOU LIKE TO RECEIVE THE CLIENT COPY OF YOUR TAX RETURN

I will sign and pick up in person (*Paper copy*)                       I will sign via **DocuSign** and receive an electronic copy

*\*Please note that every client must have their own email address to sign via **DocuSign**. Kindly provide the email addresses for all clients on Page 2 \**



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\*Please note that every client must have their own email address to sign via **DocuSign**. Kindly provide the email addresses for all clients below \*

**Client 1** Full Name: \_\_\_\_\_ Phone Number (optional): \_\_\_\_\_

Email address: \_\_\_\_\_

**Client 2** Full Name: \_\_\_\_\_ Phone Number (optional): \_\_\_\_\_

Email address: \_\_\_\_\_

**Client 3** Full Name: \_\_\_\_\_ Phone Number (optional): \_\_\_\_\_

Email address: \_\_\_\_\_

**Client 4** Full Name: \_\_\_\_\_ Phone Number (optional): \_\_\_\_\_

Email address: \_\_\_\_\_

**If you worked from home more than 50% of the time in 2024, please provide the following:**

Signed T2200 from your employer

Square footage the office/area used for work purposes \_\_\_\_\_

Total square footage of home \_\_\_\_\_

Electricity/heat \_\_\_\_\_

Internet \_\_\_\_\_

Water \_\_\_\_\_

Rent \_\_\_\_\_

Maintenance (specific to the space) \_\_\_\_\_

**If you are a commission employee, please also provide the following annual expenses**

Property taxes \_\_\_\_\_ Home Insurance \_\_\_\_\_

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



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## Personal Income Tax Checklist

### PERSONAL INCOME SLIPS

Please review the checklist below to ensure all applicable documents are submitted

|  |  |
|--|--|
|  | <b>T4</b> - All Statement of Income                        |
|  | <b>T4A</b> - Pension, Retirement, annuity and other income |
|  | <b>T3</b> - Statement of Trust Income                      |
|  | <b>T5</b> - Statement of Investment Income                 |
|  | <b>T4AP</b> - Statement of CPP Benefits                    |
|  | <b>T4A(OAS)</b> ,- Old Age Security Pension                |
|  | <b>T5008</b> - Statement of Securities Transactions        |
|  | <b>T5013</b> - Statement of Partnership Income             |
|  | <b>T5007</b> - Social Assistance Payment                   |

|  |   |
|--|---|
|  | <b>T4RSP</b> - Statement of RRSP Income                                     |
|  | <b>T4RIF</b> - Statement of Income from a Registered Retirement Income Fund |
|  | <b>T4E</b> - Statement of Employment Insurance Benefits                     |
|  | <b>T4AP</b> - Statement of CPP Benefits                                     |
|  | Any foreign income/pension  |
|  | Rental Property Income, expenses, purchases & sales                         |
|  | Capital Gain/losses schedule  |
|  | Other income _____  |

### RECEIPTS & TAX CREDITS

|  |  |
|--|--|
|  | Charitable donations   |
|  | Child care expenses  |
|  | Children's fitness programs  |
|  | Medical expenses   |
|  | Political contributions  |
|  | Professional and/or Union dues   |
|  | Investment Expenses (Interest, Fees, etc.)   |
|  | Tool expenses (apprentice, mechanics and tradesperson)   |
|  | Moving expenses <b>must be greater than 40km</b><br>Please provide all receipts and indicate distance moved and for what purpose |
|  | If you are claiming home office indicate:<br>Area used for work purposes _____ Sq ft<br>Total Sq Ft of home _____ Sq Ft          |

|  |  |
|--|--|
|  | Home Buyer's tax credit  |
|  | Disability Tax Credit Certificate  |
|  | Declaration of Conditions of Employment (Form T2200)                                   |
|  | Custody Arrangement and Copy of Agreement/<br>Support Payments Documentation           |
|  | Tuition and Enrolment Certificate (Form T2202/<br>T2202A)                              |
|  | Vehicle/Travel Logbooks and Expenses   |
|  | If you are a teacher, indicate the amount spent on school supplies in the year \$_____ |
|  | Rent <b>*only one person per household can claim</b>                                   |
|  | Adoption expenses and receipts   |
|  | Other _____  |

Notes: \_\_\_\_\_