



PLEASE CHECK OFF THE ITEMS BELOW THAT ARE APPLICABLE TO YOUR 2019 PERSONAL TAX RETURN. RETURN THIS SCHEDULE TO OUR OFFICE TOGETHER WITH ALL COPIES OF THE RELEVANT DOCUMENTATIONS AS FOLLOWS:

| Income  |  |
|---|--|
| <input type="checkbox"/> T4 Employment slips and any other taxable benefits not reported on the T4<br><input type="checkbox"/> T5 Investment slips<br><input type="checkbox"/> T4A(OAS): Old Age Security<br><input type="checkbox"/> T4AP: CPP Benefits<br><input type="checkbox"/> Other information slips (T3, T4A, T4E)<br><input type="checkbox"/> Pension income (Canada & Abroad)<br><input type="checkbox"/> Social Assistance payments<br><input type="checkbox"/> Workers' Compensation Benefits<br><input type="checkbox"/> Interest and dividends<br><input type="checkbox"/> Capital gains/losses record<br><input type="checkbox"/> Sale of real estate (proceeds, adjusted cost basis, outlays)<br><input type="checkbox"/> Gain / loss summary of investments<br><input type="checkbox"/> Elected split pension<br><input type="checkbox"/> Rental income/expenses (attached worksheet) | <input type="checkbox"/> RRSP withdrawals<br><input type="checkbox"/> Spousal support payments received<br><input type="checkbox"/> Child support payments received<br><input type="checkbox"/> Partnership income/loss (T5013)<br><input type="checkbox"/> Professional income/expenses (attached worksheet)<br><input type="checkbox"/> Commission income/expenses (attached worksheet)<br><input type="checkbox"/> Self-employment income/expenses (attached worksheet)<br><input type="checkbox"/> Farming income/expenses<br><input type="checkbox"/> Fishing income/expenses<br><input type="checkbox"/> GST Rebates received<br><input type="checkbox"/> Foreign Income<br><input type="checkbox"/> Stock options exercised |
| Deductions  |  |
| <input type="checkbox"/> RRSP Contributions (up to March 1, 2020)<br><input type="checkbox"/> Union & professional dues<br><input type="checkbox"/> Childcare expenses<br><input type="checkbox"/> Moving expenses (if >40km closer to work)<br><input type="checkbox"/> Child support payments made<br><input type="checkbox"/> Spousal support payments made<br><input type="checkbox"/> Investment carrying charges – interest, account fees, counsel fees   | <input type="checkbox"/> Exploration and Development expenses (T101)<br><input type="checkbox"/> Northern residents' deduction<br><input type="checkbox"/> Declaration conditions of employment (T2200)<br><input type="checkbox"/> Employment expenses<br><input type="checkbox"/> Automobile logs<br><input type="checkbox"/> Home office receipts   |
| Tax Credits   |  |
| <input type="checkbox"/> Medical expense receipts<br><input type="checkbox"/> Volunteer firefighter's statement<br><input type="checkbox"/> Search and rescue volunteers' statement<br><input type="checkbox"/> Public transit receipts (to June 30, 2017)<br><input type="checkbox"/> First-time home buyer – house purchase documents   | <input type="checkbox"/> Tuition receipts (T2202A, TL11A, TL11B, and/or TL11C) – or those forms signed by the child to transfer to the parent<br><input type="checkbox"/> Interest paid on student loans<br><input type="checkbox"/> Charitable donation receipts<br><input type="checkbox"/> Political donation receipts  |



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- Adoption expenses
- Fertility treatment expenses
- Disability tax credit application (T2201) – self or dependant

- Foreign taxes paid
- Dates spent in the USA (If you vacation extensively in the USA, this will help us determine if you have any US filing requirements)

### Other

- If prior year was completed by another accountant, please provide a copy of the tax return.
- Other Comments:



**Rental Income and Expenses Worksheet (Filled for each individual property)**

**PROPERTY DETAILS**

Address of Rental Property: \_\_\_\_\_ City \_\_\_\_\_  
 Province/State \_\_\_\_\_ Postal Code \_\_\_\_\_ Country \_\_\_\_\_  
 Ownership Percentage (%) \_\_\_\_\_  
 Full Name and SIN of Co-Owners \_\_\_\_\_

**RENTAL INCOME:**

GROSS RENTAL INCOME: \_\_\_\_\_

**RENTAL EXPENSES:**

- ADVERTISING \_\_\_\_\_
- INSURANCE \_\_\_\_\_
- MORTGAGE INTEREST \_\_\_\_\_
- OFFICE EXPENSES \_\_\_\_\_
- LEGAL & ACCOUNTING \_\_\_\_\_
- MANAGEMENT & ADMIN \_\_\_\_\_
- REPAIRS & MAINTENANCE \_\_\_\_\_
- PROPERTY TAXES \_\_\_\_\_
- TRAVEL \_\_\_\_\_
- UTILITIES \_\_\_\_\_
- OTHER (SPECIFY) \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Did you pay for any major renovations or large purchases (i.e. appliances) during the tax year?

YES  NO

If "YES", please provide the details of the renovations/purchase and provide the cost amount below:

| Amount   | Description |
|----------|-------------|
| \$ _____ | _____       |
| \$ _____ | _____       |
| \$ _____ | _____       |
| \$ _____ | _____       |
| \$ _____ | _____       |
| \$ _____ | _____       |

While you do not need to send us your individual expense receipts, please note that Canada Revenue Agency may ask to see these at some point after your tax return has been filed. Acceptable receipts must be issued by the vendor (not a credit card statement) and should include the date, vendor name, and amount paid. CRA also requires that automobile expense claims be supported by a mileage log.

Renovations and other purchases may be treated as capital assets and as such cannot be expensed against the income in the year purchased but rather over time. Capital renovations will be added to the cost basis of the property and can be either amortized over time, or not amortized. We will consult you on your options regarding your preferred treatment of the property.



**SELF-EMPLOYED INCOME AND EXPENSES WORKSHEET (TO BE FILLED OUT FOR EACH BUSINESS)**

Name of business \_\_\_\_\_ Type of business \_\_\_\_\_  
 Names of Partners and Percentage (%) owned \_\_\_\_\_

**REVENUE:**

Gross Receipts/ Sales \_\_\_\_\_

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

**EXPENSES:**

Advertising \_\_\_\_\_

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

Meals and Entertainment \_\_\_\_\_

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

Insurance \_\_\_\_\_

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

Interest & Bank Charges \_\_\_\_\_

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

Licenses, Dues, and Memberships \_\_\_\_\_

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

Office Expense \_\_\_\_\_

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

Supplies \_\_\_\_\_

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

Professional Dues \_\_\_\_\_

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

Rent \_\_\_\_\_

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

Repairs and Maintenance \_\_\_\_\_

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

Salaries \_\_\_\_\_

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

Travel \_\_\_\_\_

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

Telephone and Utilities \_\_\_\_\_

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

**VEHICLE EXPENSES:**

Year, Make and Model \_\_\_\_\_

Kilometers Driven for Business \_\_\_\_\_

KMs

Total Kilometers Driven \_\_\_\_\_

KMs

If Leased, Date Lease began? \_\_\_\_\_

Purchase/Sale Price \_\_\_\_\_

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

Gas \_\_\_\_\_

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

Insurance \_\_\_\_\_

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

Repairs & Maintenance \_\_\_\_\_

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

Interest on Auto Loans \_\_\_\_\_

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

Leasing costs \_\_\_\_\_

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

**HOME OFFICE:**

Square footage of office \_\_\_\_\_

SQ FT

Square footage of home \_\_\_\_\_

SQ FT

Heat / Electricity \_\_\_\_\_

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

Maintenance \_\_\_\_\_

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

Mortgage interest \_\_\_\_\_

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

Property Taxes \_\_\_\_\_

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

**Is your business registered for GST?**

YES  NO  If yes, what is your GST number?

**Is GST included in the above amounts?**

YES  NO



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**EMPLOYMENT EXPENSES / COMMISSIONED EMPLOYEE EXPENSES**

**(ONLY IF A T2200 IS PROVIDED AND EXPENSE**

**DEDUCTIONS ARE DEPENDANT ON THE CONDITIONS OF EMPLOYMENT SO NOT ALL MAY BE APPLICABLE)**

|                 |          |
|-----------------|----------|
| Travel          | \$ _____ |
| Parking         | \$ _____ |
| Office Supplies | \$ _____ |
| Telephone       | \$ _____ |
| Office Rent     | \$ _____ |

**Vehicle Expenses (If Applicable):**

|                                 |           |
|---------------------------------|-----------|
| Year and Make & Model           | _____     |
| Purchase/Sale Price             | \$ _____  |
| Date of Purchase/Sale           | _____     |
| If leased, Date Lease began?    | _____     |
| KMs driven for business purpose | _____ KMs |
| Total KMs driving in the year   | _____ KMs |
| Fuel                            | \$ _____  |
| Repairs & Maintenance           | \$ _____  |
| Insurance                       | \$ _____  |
| Licensing & Registration Fees   | \$ _____  |
| Loan Interest                   | \$ _____  |
| Lease payments                  | \$ _____  |
| Car Washes                      | \$ _____  |
| Parking                         | \$ _____  |

**For Commission Employees only:**

|                            |          |
|----------------------------|----------|
| Accounting & Legal Fees    | \$ _____ |
| Advertising & Promotion    | \$ _____ |
| Meals and Entertainment    | \$ _____ |
| Rental of Office Equipment | \$ _____ |
| Training                   | \$ _____ |

**HOME OFFICE:**

|                          |             |
|--------------------------|-------------|
| Square footage of office | _____ SQ FT |
| Square footage of home   | _____ SQ FT |
| Heat / Electricity       | \$ _____    |
| Maintenance              | \$ _____    |
| Mortgage interest        | \$ _____    |
| Property Taxes           | \$ _____    |

Do you qualify for the GST Employer rebate? YES  NO  If yes, what is your employer's GST number?



**Any other notes or inquiries please leave in the space provided below:**

A large, empty rectangular box with a thin black border, intended for handwritten notes or inquiries. A large, faint, semi-transparent version of the GIVENS logo is centered within this box.

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