Charles R. Summers Professional Corporation

CHARTERED PROFESSIONAL ACCOUNTANT – LICENSED PUBLIC ACCOUNTANT

Name and Address

_____
_____
_____
_____

(Cell) Telephone #: _____

Email: _____

❑ **Personal or address changes (**new address, telephone number, disabilities, deaths, births, marriage, separation)? **Please make notes on page 2.**

Please circle:

Do you own or control foreign assets? (stocks, bonds, cash, real property, etc.)	Y	**N**
Provide address to Elections Canada?	**Y**	N
Did you buy or sell real estate in 2024	**Y**	**N**
Do you want to receive information about organ donations from Health Canada?	**Y**	N
Use pension splitting?	**Y**	N

Downloadable forms available on my website:

www.summerscpa.ca

Downloadable forms in PDF

Rental summary

Business use of home

Self-employed / employment / commission

Term of engagement

This checklist page

Downloadable forms in excel:

Excel forms

GENERAL ITEMS

- ❑ Notices of assessment since last year
- ❑ **T4** (employment); **T4U** (employment insurance)
- ❑ **T4OAS** (old age security); **T4A(P)** (Canada Pension Income)
- ❑ **T4A** (pension income, commissions or self-employed income, CERB or other covid-19 assistance)
- ❑ **T4RIF, T4RSP** income
- ❑ **T5** (investment income)
- ❑ **T3** (income from trusts & mutual funds)
- ❑ **T5007** (workers' compensation, social assistance payments)
- ❑ **T5013** (partnership income)
- ❑ **T5008 and details of investment transactions** (shares sold and cost of those shares) or other investment income
- ❑ **Foreign** pensions or social security
- ❑ **RRSP** contribution slips
- ❑ Details of **home buyer** repayment/ withdrawal
- ❑ **Charitable** donations
- ❑ **Child care** expenses
- ❑ **Medical** receipts and attendant care expenses
- ❑ **T2202(A)** (**tuition** fees - **signed by student** if a transfer is authorized)
- ❑ Interest paid on **student loans**
- ❑ Professional **fees** or union **dues**
- ❑ I**nterest** paid on Investment Loans
- ❑ Child and Spousal **support** income/payments
- ❑ Legal or other costs related to child support or employment
- ❑ Details of purchase of **tools** for your job and T2200
- ❑ Details of any **foreign income** and holdings
- ❑ Amounts paid by **installments**
- ❑ Property **taxes/rent** paid and to whom paid
- ❑ Mutual Fund annual statements
- ❑ Details of any **property sales including your residence**
- ❑ Information on **dependents**
- ❑ Information related to any **disabilities** of a family member

Ontario **Seniors Care at Home** / Ontario **Seniors Public Transit** / **Seniors Home Safety** Tax Credit information

RENTAL PROPERTY

- ❑ Address and number of units
- ❑ Rent collected per unit
- ❑ Mortgage interest
- ❑ Property taxes paid
- ❑ Utilities
- ❑ Repairs and maintenance
- ❑ Renovation costs
- ❑ Insurance
- ❑ Advertising
- ❑ Other rental expenses

SELF-EMPLOYED COMMISSION, EMPLOYMENT AND TRAVEL EXPENSES and WORK AT HOME

- ❑ Signed form TL2 (transportation employees)
- ❑ Signed form T2200 from employer (declaration of conditions of employment)
- ❑ Summary of auto operating costs
  - ❑ Fuel/repairs/insurance
  - ❑ License
  - ❑ Lease/Buy Info
  - ❑ Expense Reimbursement from Employer
  - ❑ Mileage Summary –**total km and business km for the year**
- ❑ Advertising and promotion
- ❑ Cellular Telephone
- ❑ Hotels and Travel Costs
- ❑ Summary of Home Expenses
  - ❑ Rent and condo fees
  - ❑ Telephone, internet
  - ❑ Utilities
  - ❑ Maintenance
  - ❑ Insurance (commission or self)
  - ❑ Property Taxes (commission or self)
  - ❑ Mortgage Interest (self-employed)
  - ❑ Size of house (sq ft) size of area used for business (sq ft)
  - ❑ Frequency of use (exclusive, daily 9-5 etc)

MOVING EXPENSES

- ❑ Movers Bill
- ❑ Truck rental
- ❑ Temporary Accommodations
- ❑ Meals
- ❑ Cost of selling old home
- ❑ Cost of buying new home
- ❑ Expense reimbursement from employer

WORK FROM HOME

- ❑ **Long calculation only**
  - ❑ T2200 (declaration of conditions of employment signed by employer)
  - ❑ Rent and condo fees (utilities portion only)
  - ❑ Heat, light, water
  - ❑ Telephone, internet
  - ❑ Maintenance
  - ❑ Supplies
  - ❑ Property Taxes (commission only)
  - ❑ Insurance (commission only)
  - ❑ Size of house (sq ft)
  - ❑ Size of area used for business (sq ft)
  - ❑ Frequency of use (exclusive, daily 9-5 etc)

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Notes:

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