L. Liang Inc.

Chartered Professional Accountant Tel: 604 939 4805

Unit #101A–3020 Lincoln Ave Fax: 604 939 8485   
Coquitlam BC V3B 6B4 www.Lliangcpa.com



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| **Personal Information** |
| Current mailing address:  Phone number: Email: |
| Details of any change in marital |
| **Dependents** |
| Names Birth date SIN  Names Birth date SIN |
| **For new client, please bring prior year tax return & assessment and go to**  **CRA “MY ACCOUNT”/ UNDER PROFILE >MANAGE REPRESENTATIVES>ADD our BN:810478172** |
| **Personal income tax installments paid for this year**: |
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| **Foreign Property** |
| Did you own or hold foreign property with an **adjusted cost base** of more than $100K at any time during i.e. Marketable securities, foreign rental property.. |
| **Principal Residence** |
| Did you change the use of your principal residence? i.e. Move out and rent out your principal residence?  **Provide the following: Acquisition date; Disposition date; Cost; Sale proceeds; Selling expenses** |
| **Direct Deposit / CRA On-Line Mail** |
| Are you registered? Please register and/or advise us |
| If you would like to register to receive correspondence from CRA on-line please let us know  **General income** |
| T4 Employment income  T4E - Employment insurance |
| T5007 - Workers’ Compensation Benefits / Social Assistance payments |
| T4A – Self-Employed Commissions   |  | | --- | | **Pension and Other Income** | | T4A - Pension, retirement, annuity, old age security, or other income | | T4AP - Canada Pension Plan benefits | | T4OAS - Old Age Security pension | | T4RIF - Income from a registered retirement income fund | | T4RSP - Income from registered retirement savings plans | | Foreign pension income |  |  |  | | --- | --- | | **Investment Income & Deductions** | | | T3 - Interest, dividends, capital gains, mutual funds | | | T4PS - Statement of employee profit-sharing plan allocations & payments | | | T5 - Investment and dividend income | | | T5013 - Statement of partnership income | | | T5008 - Statement of securities transactions | | | Annual trading summary; realized gain / loss on investments summary (usually obtainable from broker) | | | Interest paid on loans for investment purposes | | | Other carrying charges or investment management fees paid – for **NON-REGISTERED ACCOUNTS ONLY** | | | Information on any business investment losses | | | Other capital property dispositions – i.e. sale of rental property, etc. | | |
| **Deductions** |
| RRSP receipts, Any Home Buyers repayment plan |
| Union & professional dues receipts |
| Child care expenses and/or attendant care expenses |
| Spousal alimony support payments received or paid – including spouse’s name and SIN  Employment expenses? Need form T2200 from employer   |  | | --- | | **Self-employment / Business / Professional / Rental Income & Deductions** | | Details of self-employed income and expenses for the calendar year | | Home office expenses – i.e. square footage usage, utilities, insurance, strata fees, mortgage interest, property taxes & rent, if applicable | | Details of real estate rental income and expenses for the calendar year | | **Other Credits** | | Tuition slips (T2202A) and receipts  Statement of interest paid on student loans | | Medical & dental receipts – including amounts paid to a private health services plan  - **ONLY NON-REIMBURSED AMOUNTS** | | Attendant care or long-term care facility costs – may be claimed as medical expenses in certain situations | | Charitable and political donations receipts | | Home renovation expenses (up to $10,000) that improve accessibility for qualifying individuals;  A qualifying individual is: - an individual who is 65 years or older or, an individual who is eligible for t the disability tax credit. | | Home buyers’ amount – Can claim $5,000 for the purchase of a qualifying home (must meet certain conditions); | | Eligible Educator School Supply Tax Credit – Can claim up to $1,000 as an eligible supplies expense. Must meet certain conditions:  Eligible educator includes a teacher (elementary or secondary school) or, an early childhood educator at a regulated child care facility AND, Must meet the “eligible teaching supplies” conditions as set out in the CRA guide. | |
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