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 SINNames 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 incomeT4E - Employment insurance |
| T5007 - Workers’ Compensation Benefits / Social Assistance payments  |
| T4A – Self-Employed Commissions

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|  **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  |

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| **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.  |

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| **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

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| **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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