

# PERSONAL TAX INFORMATION REQUEST

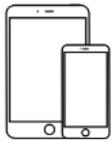
## Dear Client:

At Baker Tilly GWD LLP, we understand the need for a thorough and accurate tax return and we want to ensure that you have collected all the information necessary in order for us to prepare your return quickly and efficiently. That is why we have provided you with the attached Information Request Form, to assist you in your information gathering.

## PROVIDE US YOUR DOCUMENTS

Once you have gathered all the relevant information slips and documents required for us to prepare your tax return, please upload an electronic copy to our secure client portal using this web address: <https://cbgwd.sharefile.com/share/filedrop>, or you can mail or drop off your information to our office. If you wish to explain anything in person to the individual preparing your returns, please contact us to schedule a call or meeting.

We ask that you submit your documents **after March 1**. Returns prepared in February often require us to amend your tax return due to an unexpected information slip arriving later.



When providing documents electronically, please refrain from sending photos of the documents. Instead, use your mobile device or tablet to scan your documents to PDF (no app download required—it's easy!). Click [here](#)<sup>1</sup> for iPhone or [here](#)<sup>2</sup> for Android to view a quick tutorial. You can save the PDF to "Files" (iPhone) or access it through Google Drive (Android) to upload it directly to ShareFile from your mobile device. Alternatively, you can email it to yourself to upload to ShareFile using your computer.

## DEADLINE

The earlier that we receive your information, the earlier your return will be completed. We cannot guarantee completion of your return by this year's personal tax deadline of **April 30** if we receive your information after **April 6**, unless otherwise arranged (e.g., if you are expecting a slip to be issued as late).

## ELECTRONIC FILING (E-FILE)

Before we can electronically submit your tax return to CRA you must sign a form, that we will provide to you, which authorizes our Firm to E-file your return. These will be available to sign when you pick up your return, meet with someone to review it, or receive it securely by Adobe Sign email or a CCH iFirm Portal.<sup>3</sup>

## DIRECT DEPOSITS

The Canada Revenue Agency can deposit your tax refund directly to a bank account of your choice. In most cases, this means that your refund will be deposited to your bank account within two weeks of e-filing.

If you wish to do this and have not already enrolled in direct deposit, provide us with a voided personalized cheque or direct deposit form to prepare the request. Your election to use direct deposit remains active unless it is revoked in writing by you. If you have previously submitted your direct deposit information, there is no need to do so again unless banking information has changed.

If you owe tax in a year, the Canada Revenue Agency can withdraw these funds from your designated bank account **only if** you separately elect to enroll in a pre-authorized debit agreement with them.

<sup>1</sup> [https://www.youtube.com/watch?v=6cgw9MzXC\\_U](https://www.youtube.com/watch?v=6cgw9MzXC_U)

<sup>2</sup> <https://youtu.be/uMmotfLwLZo>

<sup>3</sup> Adobe Sign and CCH iFirm Portal both employ industry standard security practices to protect your documents, data, and personal information. Adobe Sign is certified compliant with ISO 27001, SOC 2 Type 2, and PCI DSS. CCH iFirm Portal is certified compliant with SOC2, SSAW16, ISO 27002 and ISO 27018. You may click to sign your tax return via Adobe Sign or the CCH iFirm Portal.

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# Personal Income Tax Information Request Form



## AUDIT SHIELD

Due to high demand from our clients and increasing audit activity by the Canada Revenue Agency nationwide, we continue to offer the Audit Shield Fee Waiver Service. Simply put, clients who participate in this service will benefit from professional fees being waived in relation to most audits, enquiries, investigations, or reviews. If you are interested in this service and have not already enrolled, please contact our office for more information.

## CLOSING REMARKS

Please note that our offices will be closed on Friday, May 1, 2026.

Our internal privacy policies ensure that your personal information is protected.

We look forward to serving you again. If you have any questions, please contact us at your earliest convenience.

Yours very truly,

Baker Tilly GWD LLP

## IMPORTANT DATES TO REMEMBER

<b>March 2, 2026</b>	• All RRSP contributions for 2025 must be made
<b>March 16, 2026</b>	• First quarterly instalment for 2026 is due, if required
<b>April 15, 2026</b>	• U.S. income tax return or filing extension must be filed
<b>April 30, 2026</b>	• Canadian income tax return must be filed unless self-employed
	• Taxes are due for all Canadian individual taxpayers
<b>June 15, 2026</b>	• Canadian income tax return must be filed for self-employed taxpayers

*Remember: Late-filed returns and late payment of taxes are subject to interest and penalties!*

## INSTRUCTIONS FOR PERSONAL INCOME TAX INFORMATION REQUEST FORMS

- **If you have provided us with personal information for yourself, your spouse and/or your dependants in previous years, you need to fill in only your names and any information that has changed.**
- For new clients, please provide us with a **complete copy (including schedules)** of your prior year tax return and notice of assessment/reassessment.
- Please try your best to **send us all materials at once**; do not send multiple batches of materials. If this is not possible, please let us know what is still outstanding for us to note in our files.
- You should retain copies of all slips, documents, and other data that form the basis of income and deductions that you send to us. These may be necessary to prove the accuracy and completeness of the income tax return to the CRA. **We retain certain supporting slips for one year**, and then return them to you.
- Review each section and answer **each** applicable question carefully. You are not required to select “NO” for those questions that do not apply. However, **please select “YES” where applicable** to help us confirm the completeness of information provided.
- **Provide a copy of all slips or supporting documents for which you have selected “YES”.**

# Personal Income Tax Information Request Form



## PERSONAL INFORMATION

Personal Information	Taxpayer	Spouse / Partner			
Name					
SIN					
Date of Birth					
Phone Number					
Email Address					
Address					
Postal Code					
Did your marital status change during the year? YES <input type="checkbox"/> NO <input type="checkbox"/>		What is your marital status?			
If "YES", please provide date ____/____/____		<input type="checkbox"/> single <input type="checkbox"/> married <input type="checkbox"/> widowed <input type="checkbox"/> divorced <input type="checkbox"/> separated <input type="checkbox"/> common-law			
Are we preparing a tax return for your spouse or common-law partner? YES <input type="checkbox"/> NO <input type="checkbox"/>		If no, enter his/her net income as it is required to claim certain credits \$ _____			
Dependants					
Do you have new dependant(s) this year? If "YES", please provide the following details for your new dependants.				YES <input type="checkbox"/> NO <input type="checkbox"/>	
Name	Citizenship	Date of Birth	SIN	Disabled	Income
				YES <input type="checkbox"/> NO <input type="checkbox"/>	
				YES <input type="checkbox"/> NO <input type="checkbox"/>	
If we are preparing a tax return for your dependant(s), please prepare a copy of this checklist or equivalent for each one.					

Background Information	Taxpayer	Spouse / Partner
Are you a Canadian citizen?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you authorize CRA to provide information about you to Elections Canada?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you consent to share contact information with Ontario Health so they may contact you with information regarding organ and tissue donation?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you open one or more First Home Savings Accounts (FHSA) in 2025?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you own foreign assets with total cost greater than \$100,000 at any time in 2025?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Please provide details of ownership of foreign assets and transactions with foreign entities, preferably in a report from your investment broker. Please note that PENALTIES ARE APPLICABLE if not reported.		
Do you authorize us to communicate directly with your investment advisor?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
If "YES", please provide the advisor's name: _____ and phone number/email: _____		
Have you attached the Notice of Assessment from last year?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you a Northern Resident?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you a US citizen or a green card holder? Please specify.	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Have you been in the US more than 183 days over the past 3 years?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
If yes, provide the number of days present in the US in each of: 2025: _____	2024: _____	2023: _____
Would you like to receive a password-protected PDF copy of your tax returns by Adobe Sign or CCH iFirm Portal? If "YES", no paper copy will be provided.	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
If you prefer to receive a paper copy of your return(s), where do you prefer pick-up?	Elora Office <input type="checkbox"/>	Guelph Office <input type="checkbox"/>

Ontario Tax Credits			
How much in rent payments or property taxes did you pay in respect of your principal residence during the year?			
Property Address:	Landlord/Municipality:	Rent <input type="checkbox"/>	Amount:
		Property tax <input type="checkbox"/>	\$
Property Address:	Landlord/Municipality:	Rent <input type="checkbox"/>	Amount:
		Property tax <input type="checkbox"/>	\$

# Personal Income Tax Information Request Form



## INCOME

Employment Income				Taxpayer		Spouse / Partner	
T4 Employment Income				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4A Commission, Self Employment or Other Income				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4E Employment Insurance				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T5007 Social Assistance				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Income not provided on a T-slip, such as tips or additional taxable benefits If "YES", how much did you receive for this tax year?				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
				\$ _____		\$ _____	
Pension Income							
T4A Pension, retirement, and annuity income				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4A(P) Canada Pension Plan				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4A(OAS) Old Age Security				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4A-RCA Retirement compensation arrangements				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4RSP Registered retirement savings plan				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4RIF Registered retirement income fund				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you have a pension from outside Canada? If "YES", from: _____				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you wish to elect to split eligible pension income with your spouse/partner?				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Investment Income							
T3 Trust				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T5 Investment				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4RESP, RRSP withdrawals				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4PS Profit Sharing				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T4FHSA				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T5013 Partnership				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
T5008 Securities transactions				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Tax on Split Income (TOSI). Indicate if any of your investment income originates from a relative's business or trust.				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Other:				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Did you hold and/or trade cryptocurrency in the year? If "YES", provide details.				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Did you dispose of any property or investments during the year (excluding principal residence)? For investments in securities, it is preferable to provide us with the realized gain/loss reports from your broker. For other property, please provide additional information for each transaction.				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Description of Property and/or Investments and Quantity		Date Acquired	Date of Disposal	Proceeds of Sale	Cost when Acquired	Expenses on Sale	
Sale of Principal Residence							
Did you sell your primary residence during the year?				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have you owned any other residential properties since acquiring your residence? If "YES", provide details.				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have you made a personal residence designation in the past? If "YES", please indicate the years designated:				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Description of Principal Residence		Date Acquired	Date of Disposal	Proceeds of Sale	Cost when Acquired	Expenses on Sale	
Rental Income							
Do you have rental income? If "YES", please complete Appendix 2: rental income worksheet				YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>

# Personal Income Tax Information Request Form



Business, Professional, or Farming Income		
Do you have income from a business, professional fees, self-employment, farming, fishing, etc.? If "YES", please complete <a href="#">Appendix 3: business income worksheet</a>	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Is your business registered for HST? If "YES", please provide your HST number: _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
If you provided an HST number, would you like us to file your HST return for you? If "NO", provide copies of HST returns filed to ensure consistency with your T1 return.	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>

Other Income		
Do you receive spousal support? If "YES", how much did you receive for this tax year? \$ _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Is any amount of the spousal support received considered child support, which is non-taxable? If "YES", indicate amount considered child support. \$ _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Other:	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>

## DEDUCTIONS and TAX CREDITS

Employment, Investment, Other	Taxpayer	Spouse / Partner
Union/Professional dues	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you claiming deductible employment expenses such as auto, home office, other employment expenses? If "YES", please complete <a href="#">Appendix 1: home and auto worksheet</a> , and provide details of other expenses. Please provide form T2200 signed by your employer.	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you make RRSP contributions? If "YES", provide official RRSP receipts	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you make FHSA contributions? If "YES", provide T4FHSA slip	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Charitable and/or political donations	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Childcare expenses	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Moving expenses	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you make spousal support payments? If "YES", how much did you pay for this tax year? \$ _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Is any amount of the spousal support payments considered child support, which is not tax-deductible? If "YES", indicate amount considered child support. \$ _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Medical expenses: We prefer you do not provide individual prescription receipts; instead obtain a detailed printout from your pharmacy and provide a copy to us	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Did you perform renovations to allow a senior relative (65 or older), or an adult relative with a disability, to live in your personal residence? If "YES", indicate the amount paid up to \$50,000, which may be eligible for credit. Provide receipts. \$ _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you have a disability tax credit certificate to claim (T2201)?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Investment carrying charges: interest, account fees, counsel fees	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Tuition for taxpayer T2202A / TL11A	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Tuition amount claimed on transfer from dependant T2202A / TL11A	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Student loan interest	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Have you purchased your first home in 2025 for first time homebuyers' credit?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do any of the following credits/deductions apply to you: Ontario seniors' public transit tax credit, educator school supply credit, PSW tax credit, mechanic apprentice tools deduction, or volunteer firefighter credit?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
Tax Instalments		
Did you make tax instalments during the year? If "YES", how much? \$ _____	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>

Notes:
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# Personal Income Tax Information Request Form



## APPENDIX 1: HOME OFFICE and AUTOMOBILE WORKSHEET

To deduct home office or automobile expenses, you must be able to answer "YES" to one of the following questions:

Are you required by your employer to maintain a workspace in your home or to use your vehicle to travel for work? Attach T2200 signed and filled out by employer	YES <input type="checkbox"/> NO <input type="checkbox"/>
If providing form T2200, is your employer a GST/HST registrant other than a listed financial institution?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you an employed salesperson earning commissions and maintaining a workspace in your home?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you self-employed with a business that you are running out of your home?	YES <input type="checkbox"/> NO <input type="checkbox"/>

The costs of a workspace in the home for an employee are only deductible when the workspace is either:

- The place where the individual principally performs the duties of the office or employment, **or**
  - Used exclusively during the period in respect of which the amount relates for the purpose of earning income from the office or employment and used on a regular and continuous basis for meeting customers or other persons in performing duties
- If you did not use your home office space exclusively to earn income, what % of the time was it used to earn income? \_\_\_\_\_%
  - Please add up all expenses incurred and enter 100% of the summarized amounts below. We will subtotal and prorate your expenses based on the amounts provided to us.
  - See Deductibility of Workspace in the Home Costs table at bottom of this page
  - Do not provide supporting documents to us. However, you must keep all documents and receipts for your records in case the CRA requests copies.

Home Office Expenses		Automobile Expenses	
Office area (square feet or metres)		Vehicle year/make/model/purchase date:	
Total home area (sq. feet or metres)		Odometer reading, Jan 1 <sup>st</sup>	
Utilities	\$	Odometer reading, Dec 31 <sup>st</sup>	
Rent	\$	Total kilometres for the year	
Home insurance	\$	Kilometres driven for business	
Repairs and maintenance	\$	Car insurance	\$
Mortgage interest	\$	Fuel expenses	\$
Property taxes	\$	Interest on loan or lease costs per month	\$
Telephone/internet	\$	Maintenance and fees	\$
Other (specify):	\$	Parking and tolls	\$
CCA on house (not recommended)	\$	Other (specify):	\$

Deductibility of Workspace in the Home Costs ( <i>understanding what is deductible</i> )			
<i>Deductible?</i>	Employee – No Commissions	Employee – With Commissions	Self-Employed Business Income
Rent (if tenant)	Yes	Yes	Yes
Utilities	Yes	Yes	Yes
Repairs and maintenance	Yes	Yes	Yes
Telephone (supply) *	No/Yes	No/Yes	Yes
Internet (supply) *	No	No	Yes
Property taxes	No	Yes	Yes
Home insurance	No	Yes	Yes
Mortgage interest	No	No	Yes
CCA on house	No	No	Yes
*Employees cannot deduct the monthly basic cost of a home telephone or the cost of fees for home internet service. Long distance charges that reasonably relate to employment income are deductible. In contrast, to the extent that telephone and internet service at an individual's home is used for both business and personal purposes, the business portion of the expense are deductible. A reasonable basis or proration should be used.			

# Personal Income Tax Information Request Form



## APPENDIX 2: RENTAL INCOME WORKSHEET

- Please add up all income and expenses and only enter the summarized amounts below or attach a copy of your financial statements if you track your income and expenses with software.
- If you would like to use our Excel bookkeeping template to track your income and expenses, please ask us for a copy.
- Do not provide supporting documents to us, other than digital platform operator statements for short-term rentals. However, you must keep all documents and receipts for your records in case the CRA requests copies.
- If you purchased a new rental property during the year, please provide the purchase documents showing the legal title, purchase price, legal fees on the purchase, land transfer tax paid, and any other costs of acquisition.
- If you disposed of a rental property during the year, please provide the sale documents showing the sale price, legal fees on the sale, real estate commissions, and any other costs of disposition. Also, let us know if you ever lived in the property.
- Compliance for short-term rentals refers to conformity with all provincial and municipal, registration, licensing and permit requirements. Non-compliance with these requirements may result in the denial of expense claims.

	Property #1	Property #2	Property #3
Property address:			
% Ownership			
% Personal use of property			
Tenancy (short-term is < 30 days)	Short-term <input type="checkbox"/> Long-term <input type="checkbox"/>	Short-term <input type="checkbox"/> Long-term <input type="checkbox"/>	Short-term <input type="checkbox"/> Long-term <input type="checkbox"/>
Compliant? (short-term only)	YES <input type="checkbox"/> NO <input type="checkbox"/> N/A <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/> N/A <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/> N/A <input type="checkbox"/>
<b>Income</b>			
Gross rents (excluding HST/GST)	\$	\$	\$
Other (specify):			
	\$	\$	\$
<b>Total Rental Income</b>	\$	\$	\$
<b>Expenses</b>			
Advertising	\$	\$	\$
Insurance	\$	\$	\$
Interest and bank charges	\$	\$	\$
Professional fees	\$	\$	\$
Management fees	\$	\$	\$
Administration fees	\$	\$	\$
Repairs and maintenance	\$	\$	\$
Salaries, wages, and benefits	\$	\$	\$
Property taxes	\$	\$	\$
Utilities	\$	\$	\$
Motor vehicle expenses	\$	\$	\$
Other (specify):			
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
<b>Total Rental Expenses</b>	\$	\$	\$

# Personal Income Tax Information Request Form



## APPENDIX 3: BUSINESS INCOME WORKSHEET

- Please add up all income and expenses and only enter the summarized amounts below or attach a copy of your financial statements if you track your income and expenses with software.
- If you would like to use our Excel bookkeeping template to track your income and expenses, please ask us for a copy.
- If you have more than one business, please complete a separate worksheet for each business.
- If you purchased any capital assets during the year, please provide the purchase documents, note if it is new or used, and indicate if the asset is currently available for use or, if not, when it will be available for use.
- Do not provide supporting documents to us, other than digital platform operator statements if applicable. However, you must keep all documents and receipts for your records in case CRA requests copies.

Income		Expenses	
Business income: include sales, commissions, or fees (including GST/HST). Do not include amounts reported on a T4A slip.	\$	If you are a GST/HST registrant, please exclude GST/HST from expense figures listed below.	
HST collected/collectible	\$	Cost of Goods Sold	\$
Professional fees (including GST/HST)		Advertising	\$
HST collected/collectible	\$	Insurance	\$
Farming	\$	Interest and bank charges	\$
Fishing	\$	Professional fees	\$
Government subsidies or grants	\$	Management fees	\$
Income reported on a T4A	\$	Administration fees	\$
Other (specify):		Repairs and maintenance	\$
	\$	Salaries, wages, and benefits	\$
	\$	Property taxes	\$
	\$	Utilities (if not included in home office)	\$
	\$	Automobile expenses: Complete Appendix 1: automobile worksheet	\$
		Meals and entertainment	\$
		Business taxes, licenses, and memberships	\$
		Office expenses	\$
		Rent	\$
		Travel expenses	\$
		Home office: Complete Appendix 1: home office worksheet	\$
		Other (specify):	\$
			\$
			\$
<b>Total Income</b>	\$	<b>Total Expenses</b>	\$