

# Sievert Financial Services Inc.

43 Colborne Street, Suite LL100  
Toronto, ON M5E 1E3

P: 416-840-5410

F: 647-722-4289

bsievertca@gmail.com

www.SievertFinancialServices.com

We are providing this envelope for your convenience in order to attain relevant information for your personal tax return. Please complete the following personal information and checklist below in order for us to help serve you better.

Your Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_ Email: \_\_\_\_\_

Immediate Family (Children and Spouse) Info: Names, SIN, and Birthdates: \_\_\_\_\_

**Important:** CRA is increasingly focusing on Canadians with international income. It is important to notify us if you owned specified foreign property costing more than \$100,000 at any time during the year. If you are in this category and are holding foreign securities, we ask you to provide all monthly broker statements for us to report the proper information.

The following checklist is provided in order to help identify relevant information required to prepare your personal tax return. After completing the checklist, please make a copy of this page for your records as to what information was included in the envelope.

## RECEIPTS AND INFORMATION SLIPS

- Notice of assessment and re-assessment
- All tax slips (T3, T4, T4A, T4AP, T5, T5013, etc)
- Receipts for professional or union dues
- RRSP contributions and withdrawals
- Medical expense receipts
- Tuition receipts (T2202)
- Charitable and political donation receipts
- Capital gain/loss summary
- HBP or LLP activity

## OTHER TAX INFORMATION

- Interest charges for investments
- Financial advisory/brokerage fees
- Employment insurance benefits
- Social assistance payments
- Workers' compensation benefits
- Interest and dividends (not on T5 slips)
- Sale (or deemed sale) of stocks, bonds, or real estate
- Installments paid
- Other income received

## PERSONAL AND FAMILY INFO

- Child or spousal support received or paid
- Child care expenses
- Disability credit
- Caregiver/Nanny expense

## CHANGES IN FAMILY STRUCTURE

- Birth, adoption, or death in the family
- Separation or divorce

## HOME INCOME AND EXPENSES

- Rental income and expenses
- Moving expenses
- Property taxes and/or rent paid
- T2200 - Declaration of conditions of employment
- Automobile expenses (gas, R&M, insurance, license cost, total km driven, km driven for business, etc)
- Travel expenses
- Office use of home expenses
- Home accessibility improvements for the disabled or seniors
- If you use any part of your home for employment purposes, many expenses incurred on your home can be partially used as expenses for the business