



Personal Tax Worksheet

TAX YEAR

Please complete this form prior to dropping off your stuff (an option for current clients, only), or before arriving for your appointment!



Your Name:

Birthdate:

Service / Employer:

Division / Platoon:

Spouse's Name:

Spouse's Birthdate:

Spouse's Gross Income:

Names of Children

DOB of Children

Home Phone:

Cell Phone:

Donations \$

Childcare \$

Family Medical Paid \$

Home Address:

Email Address

Ontario Staycation Tax Credit

COVID Home Office Expense

For 2022 Tax Year Only

Prior To The 2023 Tax Year

	<u>Person</u>	<u>Family</u>
Maximum	\$1000	\$2000
Spent		

Tax Payer Name Expense (Max \$500)

NOTE: Read 2022 Tax Letter for details

Paid Duties:

Number of Paid Duties:

Total Annual Number of KM's for Round Trip from Station to Paid Duty:

Off Duty Court:

Number of Court Appearances:

Total Annual Number of KM's for Round Trip from Station to Court:

Auto:

Total Cost of KM's:

Total Cost of Gas \$:

Total Parking \$ (Court + Pd Duties)

Total Annual Car Wash \$:

FHSA:

Contributor:

2023 Amount \$:

RRSP's - "Contributor" **!

Self \$

Spouse \$

VEHICLE INFORMATION SECTION

Vehicles

Vehicle #1

Vehicle #2

Vehicle #3

Make/
Model/Yr

Date of
Purchase

Purchase \$

OR Lease
Start Date

Lease End
Date

Monthly
Lease

Repairs/
Maint

Insurance
Yr \$

IF FINANCED

Vehicle #1

Vehicle #2

Vehicle #3

Term

Interest
Rate

Loan
Balance on
Jan. 1

Loan
Balance on
Dec. 31

Interest
Paid per Yr

Other Tax 'Tings'

Tell me about: Other “required” expense; date and change in marital status or new dependants;
Sale in the year of principle residence (info detailed in next section); AND anything else you
think I need to know in preparing your Taxes.

Sold Principle Residence in last year?

Yes

No

If Yes

Year of purchase

Sale Price

Date of Sale

Address

**And don't forget your signed T2200 and Paid
Duty and Court printout**

Forms Attached

T4

T2200

Paid Duty Print Out

Court Appearances Print Out

Others