



## 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

*For 2022 Tax Year Only*

### COVID Home Office Expense

*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 of KM's:

Total of Gas \$:

Total Parking \$ (Court + Pd Duties)

Total Annual Car Wash \$:

**FHSA:**

Contributor:

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