Personal Tax Worksheet

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

TAX YEAR

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		
	Person	Family
Maximum	$1000	$2000
Spent		

COVID Home Office Expense	
Prior To The 2023 Tax Year	
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 Home to Court:

Auto:

Total Annual KMs:

Total Annual 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