**ARTAX – General Tax Prep**

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| **PERSONAL INFORMATION** |  |
| SIN |  |
| Full Name |  |
| Address |  |
| Phone Number |  |
| Birthday (YYYY-MM-DD) |  |
| Marital Status |  |
| Tax installments paid | $ |

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| --- | --- | --- |
|  | **YES** | **NO** |
| Canadian Citizen |  |  |
| CRA online access |  |  |
| Foreign accounts over $100,000 |  |  |
| Disability credit claim |  |  |
| Home sale in year |  |  |
| Home purchase in year |  |  |

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| --- | --- |
| **SPOUSE INFORMATION** | **If NOT FILING with Artax** |
| SIN |  |
| Full Name |  |
| Birthday (YYYY-MM-DD) |  |
| Net Income |  |

**SPOUSE INF**

|  |  |
| --- | --- |
| **CHILDREN INFORMATION** | **Add extra lines as needed** |
| Full Name |  |
| Birthday (YYYY-MM-DD) |  |
| Full Name |  |
| Birthday (YYYY-MM-DD) |  |

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| **LIST OF TAX SLIPS** | **Provide any applicable** |

Employment income T4

*If tips earned from T4 work enter total here: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Grants, scholarships T4A

Fees for services T4A, T1204

Interest, dividends, other investment income T5, T3, T5016

Capital gains T5008

Employment, maternity, paternity benefits T4E

Social Assistance or workers’ compensation T5007

Pension, annuity, severance income T4A, T4RIF, T4RSP

Canada pension plan retirement/survivor/disability T4AP

Old Age Security T4OAS

RRSP withdrawal T4RSP

RESP student income T4RSP

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| --- | --- |
| **REGISTERED PLAN INFORMATION** | **Provide totals** |
| RRSP contributions Mar 2-Dec of tax year - During 2024 | $ |
| RRSP contributions Jan-Mar 1 of current year - During 2025 | $ |
| FHSA contributions | $ |
| HBP required repayment amount | $ |
| LLP required repayment amount | $ |

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| **DONATIONS** | **Provide totals, SPOUSES COMBINE** |
| Donations to charities | $ |
| Donations to Federal political parties | $ |
| Donations to Provincial political parties | $ |
| Donations outside Canada CRA approved | $ |

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| **HEALTH COSTS** | **Provide totals, SPOUSES COMBINE** |
| **Medical & dental premiums**  exclude amounts in Box 85 of T4 slips | S |
| **Prescriptions** | $ |
| **Dental**  any non-cosmetic, but include orthodontics | $ |
| **Therapy**  any designation of practitioner | $ |
| **Optical**  include glasses, contacts, laser surgery | $ |
| **Licensed practitioners**  RMT, physio, chiro, acupuncture, etc. | $ |
| **Naturopaths**  exclude vitamins & supplements | $ |
| **Fertility treatments** | $ |
| **Prescribed devices**  for accessibility & mobility | $ |
| **Costs paid outside Canada**  to hospitals & licensed practitioners | $ |
| **Nursing home costs** | Provide receipt |
| **Attendant care costs** | Provide receipt |

|  |  |
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| **CHILD CARE COSTS** | **Provide totals, SPOUSES COMBINE** |
| **Daycare costs** | S |
| **Day camps**  min 5 days, exclude specialized programs | $ |
| **Overnight camps**  # weeks, credit based on time, not fees | # |
| **Caregiver costs**  provide SIN & name | $ |

|  |  |
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| **OTHER CREDITS/DEDUCTIONS** | **Provide totals, SEPARATE FOR SPOUSES** |
| **Accounting fees**  i.e. tax prep fee from last year | S |
| **Union dues**  exclude amount in Box 44 of T4 slips | $ |
| **Digital news subscriptions**  max $500 | $ |
| **Student loan interest**  per official statement | $ |
| **Tuition paid to Canadian institutions** | Provide T2202 |
| **Tuition paid to foreign institutions** | Provide T1L |
| **Annual rent or property taxes** | $ |
| **Employment expenses** | Provide T2200 form and list of expenses |
| **Employed teacher classroom supplies**  max $1000 | $ |
| **Legal fees**  for right to salary, support, severance | $ |
| **Senior TTC tickets**  max $300 | $ |
| **Senior accessibility renovations**  max $10,000 | $ |
| **Multigenerational home renovations**  max $50,000 | $ |

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| **RENTAL INCOME** | **Provide totals, SPOUSES COMBINE** | |
| Property address | |  |
| % rented if in own home | | % |
| Co-owners if not spouse | |  |
| Advertising | | $ |
| Insurance | | $ |
| Mortgage interest (not full payments, just interest) | | $ |
| Repairs & maintenance (exclude major upgrades or renos) | | $ |
| Property taxes | | $ |
| Utilities not paid by tenant | | $ |
| Other expenses paid for tenants (i.e. security, internet) | | $ |
| Furniture & appliances | | $ |