



## 2022 Personal Income Tax Return Information

Tax season has arrived, and we look forward to working with you over the next few months. Please read this letter carefully so you are aware of any changes from last year. Please sign the attached Engagement Letter (one per family) and complete **ALL** fields of the Information Checklist.

**Client Portal** – We encourage you to submit your tax documents, signed Engagement Letter and Checklist electronically via our secure Client Portal. We prefer documents to be submitted in PDF, Word or Excel format, as applicable. If you do not have a scanner, there are several free apps (e.g. JotNot) that you can use your cell phone to convert a photo to a PDF. If you are not yet registered for the portal or need any help along the way, please email [jenny@gregevens.ca](mailto:jenny@gregevens.ca) or call 705-880-2224 ext 201 and we will happily walk you through the user-friendly sign up or use. We are notified each time a document is uploaded to the portal, there is no need to call the office to confirm receipt of your documents.

**Drop-Off Options** – If you are unable to submit your documents electronically, you are welcome to drop them off at our office at 2 Kent Street West, Lindsay during business hours (Monday to Friday 9 am – 5 pm). There is no need to make an appointment to drop off tax documents. If you cannot print the attached documents, **please ensure that you sign an Engagement Letter and complete the checklist while at our office.** To drop off documents after hours, please use the secure mail slot available at the front door.

**Dates and Deadlines** – The deadline to file your personal income tax is **Monday, May 1<sup>st</sup>, 2023.**

To guarantee completion and filing of your taxes by the deadline, we will need **ALL** your tax documents no later than **Friday, April 7<sup>th</sup>, 2023.**

\*\*\* We ask that you wait until you have **ALL** your tax slips and documents before submitting them to our office. We will not start working on your tax return until we receive all your documents. Please review last years taxes to ensure you have received all your slips as the CRA charges penalties if any slips are missing.

**Required Documents** – The following can be uploaded to the portal or submitted in person:

- Engagement Letter – signed (one per family)
- 2022 Client Information Checklist – please complete **ALL** fields
- All slips and documents pertaining to your checklist



To assist our staff and expediate completion of your tax return, the following would be appreciated:

1. Remove all tax documents and slips from their mailing envelopes and sort your paperwork. An administration fee will be applied if our staff must open and sort your mail.
2. Request a Prescription receipt summary from your pharmacy (no charge) if you have more than 10 **prescription receipts** per person. Please include **only** the prescription receipt itself not the cash register receipt.

**Completed Tax Returns and Payment** – We will notify when your taxes are complete and ready to be signed either in person or electronically through the portal. Appointments will once again be necessary this year to sign documents and pick up your final tax documents. You can do so by calling the office at 705-880-2224 ext 201.

To electronically file your tax return, the following are required:

1. Signed Engagement Letter
2. Signed T183 (Information Return for Electronic Filing of an Individual's Income Tax and Benefit Return).
3. **Payment in full** – You will receive an invoice by email or if picking up at the office, it will be included in your package.

Payment options:

- Email money transfers to [info@gregeevans.ca](mailto:info@gregeevans.ca)
- Credit cards over the phone at 705-880-2224 ext 201
- Online payments via your emailed invoice
- Credit/Debit/Cheque at the office by appointment

As we move forward and try to embrace a greener environment and at the request of many clients choosing to forego paper copies, we encourage you to choose electronic copies of your final tax return uploaded to the portal. **A fee will apply** this year if you request to have a paper copy of your final tax return mailed out. Please indicate on the Tax Information Checklist your preference of electronic vs paper copy. Any tax documents submitted by yourself, or final tax returns uploaded to the portal, are always accessible for your reference.

**Privacy** – We respect your privacy and keep your information private and secure. We proceed on the basis that we have consent from you and your family to collect, use and disclose personal information for the sole purpose of preparing you and your family's tax returns.

If you have any questions, please don't hesitate to email [jenny@gregeevans.ca](mailto:jenny@gregeevans.ca) or by telephone 705-880-2224 ext 201.



Tax Year(s):

**Subject: Personal Income Tax Return Engagement**

The purpose of this letter is to outline the nature of our involvement with the preparation of your personal income tax return(s). If we are preparing the returns for a family, this letter applies to each individual that is stated below.

It is your responsibility to provide us with all the information required for the preparation of a complete and accurate return. Specifically, we understand that you have disclosed all sources of world-wide income and that all deductible expenses and outlays that have been claimed in your return were made for the purposes of earning or producing income and that they are not personal and living expenses.

You should retain all original documents and other data that form the basis of income and deductions.

We will prepare your income tax returns. We will not audit, review, or otherwise attempt to verify the accuracy or completeness of any information provided. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Should the CRA ask you for additional information or require explanations relating to an income tax return that we prepared for you, we will provide you with assistance. Upon request, we will represent you and will render additional invoices for professional fees for the time and expense incurred.

Sincerely,

**Greg Evans Professional Corporation**

I agree with and understand the terms of your engagement as preparers of my personal tax return(s) as set out in this letter.

_____	_____	_____
Name	Signature	Date
_____	_____	_____
Name	Signature	Date
_____	_____	_____
Name	Signature	Date
_____	_____	_____
Name	Signature	Date

INSTRUCTIONS: Please list the names of all persons for which a tax return is being prepared. Complete a separate engagement letter for those will be invoiced separately. If one person is signing on behalf of the family, that person acknowledges responsibility for all tax returns.

## 2022 TAX YEAR– CLIENT INFORMATION CHECKLIST

- Review each section and answer each applicable question carefully.
- **IMPORTANT!** Please send all documents together; do not send multiple batches of materials. We will not start working on your return until we have all your information.
- Provide a copy of all slips or supporting documents for which you have selected “YES”. Please sort and organize your documents and remove from mailing envelopes.
- For **new clients**, provide a complete copy (including schedules) of your prior year tax return and notice of assessments.
- To reduce unnecessary paper waste, we will send your completed tax return electronically through our secure client portal. If you would rather pick up a printed copy or have a copy mailed to you, please indicate here:

Pick up printed copy     
  Mail printed copy (I accept mailing costs)

PERSONAL INFORMATION	Taxpayer	Spouse / Partner		
Name				
SIN				
Date of Birth				
Phone Number				
Email Address				
Address				
YES <input type="checkbox"/> NO <input type="checkbox"/> Did your marital status change during the year? If “YES”, please provide date _____		What is your marital status? <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Common-law		
YES <input type="checkbox"/> NO <input type="checkbox"/> Are we preparing a tax return for your spouse or common-law partner? If “NO”, enter his/her net income in order to claim eligible credits \$ _____				
<b>Dependants</b>				
YES <input type="checkbox"/> NO <input type="checkbox"/> Do you have new dependant(s) this year? If “YES”, provide the following details for your new dependants				
Name	Date of Birth (YY/MM/DD)	SIN	Disabled	Income
			YES <input type="checkbox"/> NO <input type="checkbox"/>	
			YES <input type="checkbox"/> NO <input type="checkbox"/>	
<b>If we are preparing a tax return for your dependant(s), please prepare a copy of this checklist for each one.</b>				
<b>Principal Residence</b>				
YES <input type="checkbox"/> NO <input type="checkbox"/> Did you have a change in use to your principal residence? (i.e., to a rental, or from a rental)				
YES <input type="checkbox"/> NO <input type="checkbox"/> Did you sell your primary residence during the year? If “YES”, please provide the following information.				
Year Purchased	Date Sold	Sale Price	Which Taxpayer(s) is the legal owner?	

Taxpayer	Spouse/Partner	REQUIRED INFORMATION
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you a Canadian citizen?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you registered for CRA's My Account?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you a US citizen or a green card holder?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	If "YES", have you filed a US tax return for 2022?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Do you authorize the CRA to provide your name, address, and date of birth to Elections Canada?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Do you authorize the CRA to provide your name and email to Ontario Health so that they may send you information regarding organ and tissue donation?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Did you own specified foreign property with a combined cost greater than \$100,000 (CDN) at any time during the year?
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	If "YES", specify which and provide investment statements/documents: <ul style="list-style-type: none"> <li>➤ Funds held in a foreign bank account</li> <li>➤ Shares of a foreign corporation held in either Canadian or foreign accounts</li> <li>➤ Foreign rental property (does not include real estate for personal use)</li> </ul>
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	

Taxpayer	Spouse/Partner	ADDITIONAL INFORMATION
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you eligible to claim the <b>disability tax credit</b> ? If "YES", and this is the first year, or you are a new client, provide a copy of the T2201 disability certificate
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	<b>RRSP Contributions</b> to your own RRSP or a Spousal RRSP: <ul style="list-style-type: none"> <li>➤ Contributions made in March to December 2022</li> <li>➤ Contributions made in January to February <u>2023</u></li> </ul> If "YES", provide all contribution slips. We require these for your 2022 taxes
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Do you have <b>income from self-employment or farming</b> ? If "YES", provide all details on income and expenses, and if eligible, vehicle information including mileage, and home office expenses
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Is your self-employed business or farm <b>registered for HST</b> ? Would you like us to file your HST return for you? If "YES", provide your HST number, access code and instalments paid If "NO", provide copies of filed HST returns to ensure consistency with your T1
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Do you have <b>rental income</b> ? If "YES", provide all details on income and expenses, property address, name of property owners, and other information such as purchase or sale of properties
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Did you <b>sell any property or investments</b> during the year (excluding principal residence)? For investments in securities, please provide us with the realized gain/loss report from your broker.
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you claiming <b>employment expenses</b> , including <b>work from home</b> ? If "YES", provide details of relevant and eligible expenses.
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you eligible to claim the Temporary Flat Rate method (\$2/day)? If "YES", provide the number of days you worked from home in 2022? <b># of days:</b> _____ (eligible if you worked from home more than 50% of the time for at least four consecutive weeks during the year)
YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	Did your employer provide you with form T2200 Declaration of Conditions of Employment? We require a copy of this if you wish to claim detailed expenses.

## OTHER DEDUCTIONS AND TAX CREDITS

Please provide supporting documents and details for any of the following which may apply

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|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> RRSP Contributions</li> <li><input type="checkbox"/> Spousal support / Child support – <i>provide divorce / separation agreement</i></li> <li><input type="checkbox"/> Professional and union dues</li> <li><input type="checkbox"/> Childcare expenses – <i>receipts required</i></li> <li><input type="checkbox"/> Investment management / counsel fees</li> <li><input type="checkbox"/> Election to split eligible pension income</li> <li><input type="checkbox"/> Moving expenses – <i>provide details of expenses, distance from old residence to workplace, and distance from new residence to workplace</i></li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Property taxes / Rent paid in 2022</li> <li><input type="checkbox"/> Rent paid in a long-term care / nursing home – <i>please specify if the home is private or public</i></li> <li><input type="checkbox"/> Medical expenses – <i>please organize receipts and provide a prescription summary from your pharmacy instead of sending individual prescription receipts</i></li> <li><input type="checkbox"/> Disability tax credit (DTC) – form T2201 – <i>New! If you have Type 1 diabetes, you are now eligible to apply</i></li> <li><input type="checkbox"/> Disability support expenses, including attendant care</li> <li><input type="checkbox"/> Charitable or political donations</li> <li><input type="checkbox"/> Interest paid on qualifying student loans</li> <li><input type="checkbox"/> Tuition certificate T2202 – <i>advise if you would like eligible amounts transferred from your dependent(s)</i></li> <li><input type="checkbox"/> First home purchased in 2022</li> <li><input type="checkbox"/> Home accessibility tax credit – <i>eligible expenditures incurred to enhance mobility for seniors or impaired individuals, such as a wheelchair ramp, walk-in bathtub, grab bars, etc.</i></li> <li><input type="checkbox"/> Ontario staycation tax credit – <i>did you stay overnight in Ontario for vacation at a hotel, campground, or other lodging? Provide us with receipts (must be in your name) to possibly claim up to \$250. Cannot include any accommodations that were for business purposes.</i></li> </ul> |
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We kindly ask that you only provide us with organized documents and remove all original mailing envelopes prior to dropping off. An admin fee will be applied if we require additional time to sort through unorganized materials.

**For returns that have business, rental, or employment expenses**, please provide us with a summary of the expenses rather than sending all your invoices and statements. If you are an HST registrant, please make sure to specify the amount of HST included in the costs.

For example, instead of sending 12 hydro invoices, send just the total hydro cost for the year, and the amount of HST included, if applicable. If we require further information, we will contact you.

## NOTES / QUESTIONS FOR OUR TEAM