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Chartered Accountants

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PERSONAL TAX INFORMATION SHEET

2009 TAXATION YEAR

The following document is meant to provide you with a reminder of the information required by us in preparing your tax returns. Please read the notes and complete all questions carefully to ensure that you obtain full benefit for all deductions to which you are entitled. **Completion of this form is not necessary but will help ensure that your tax return is completed accurately and on a cost-effective basis. Any changes from information of the prior year should be completed.** This document is not an all-inclusive list of items applicable to personal income tax but rather is intended to be used as a guide in the preparation of your return.

Once you have completed the attached information sheet and have accumulated all of the necessary information slips and statements, please arrange immediate delivery to our office, preferably by courier.

We will again make use of Efile for 2009. Upon completion of your personal tax return, it will be electronically filed with The Canada Revenue Agency. We will be forwarding to you our invoice for completing your return, a reporting letter, an instalment schedule (when applicable), personal engagement letter, the 4 page jacket of your tax return, an electronic filing authorization form and The Canada Revenue Agency contact authorization form. You will be required to sign and return the forms to us immediately in the return envelope provided. If there is a balance owing on your return, we will inform you so that arrangements can be made for timely payment. Again this year we will not be providing a complete copy of your tax return unless specifically requested. Please indicate in the appropriate space on the following pages if you will require a complete copy of the tax return.

If you do not wish for your return to be filed electronically, please note that when providing us with your documentation.

Please feel free to contact our office at your convenience.

PERSONAL INFORMATION

		Social Insurance Number	Date of Birth		
			D	**M**	**Y**
Name					
Name of Spouse/Partner					
Name of Dependants	1.				
	2.				
	3.				
	4.				

Address | Apt #

Street | City

Province | Postal Code

Telephone: Home (   ) | Telephone: Office (   )

Telephone: Cell (   ) | Fax: (   )

Email

Is Your Address New This Year? ☐ Yes ☐ No

Are you and all members of your family Canadian citizens? ☐ Yes ☐ No

Are you or any member of your family a US citizen (or Green Card Holder)? ☐ Yes ☐ No

	D	M	Y
Date of Departure from or Entry to Canada if Within Tax Year?			
Date of Marriage if Within Tax Year			
Date of Separation or Divorce if Within Tax Year			
Date of Death			
Date of Dependant's Birth if Within Tax Year			

Province of Residency on December 31

Are you or a member of your family eligible for disability tax credits? ☐ Yes ☐ No

INCOME (include T3s, T4s, T4As, T5s, T600s, and invoices)

Business

Type of Business

Financial Statement ☐Included ☐Not Included

Employer's Business Number

Wages or Partnership Allocation to Spouse $

Capital Gains

REAL ESTATE (Address of Property Disposed of) **D M Y**

Amount of Purchase $ Date of Purchase

Amount of Sale $ Date of Sale

LISTED PERSONAL PROPERTY

Amount of Purchase $ Date of Purchase

Commissions Paid and Legal Fees $

Amount of Sale $ Date of Sale

Other Costs of Sale $

DO YOU HAVE SALES OFDEBT OR SHARES IN A CANADIAN CONTROLLED PRIVATE CORPORATION ☐ Yes ☐ No

IF YES:

Amount of Loan or Purchases $ Date of Loan or Purchase

Amount of Sale $ Date of Sale

Other Costs of Sale $

DID YOU TRANSFER ANY REAL PROPERTY TO CHILDREN OR GRANDCHILDREN? ☐ Yes ☐ No

DID YOU TRANSFER SHARES OF A SMALL BUSINESS CORPORATION OR FARM? ☐ Yes ☐ No

IF YES TO EITHER QUESTION:

Value of Transfer $ Date of Transfer

DID YOU BUY OR SELL SHARES OR MUTUAL FUNDS DURING THE TAX YEAR? ☐ Yes ☐ No

Please attach details

Did you make a February 24, 1994 Capital Gains Election? ☐ Yes ☐ No

Child Support

Received $

Paid $

Spousal Support

Received $

Paid$

Commissions $

Dividends $

Employment $

INCOME (include T3s, T4s, T4As, T5s, T600s, and invoices) (cont'd)

Taxable Benefits $

Automobile	Documents Attached	☐ Yes	☐ No
Residence	Documents Attached	☐ Yes	☐ No
Other	Documents Attached	☐ Yes	☐ No

Low Interest or No Interest Loans D M Y

Amount Outstanding $ Date Outstanding

Amount Outstanding $ Date Outstanding

Gratuities and Tips $

Interest from Investments $

Canada Savings Bonds $

Other Bonds$

Mortgages $

Trusts $

Foreign Assets in Excess of $100,000 at Cost(please attach details)

Pensions

RETIRING ALLOWANCES

Amount $

RRSP CONTRIBUTIONS

Amount $

Home Buyers' Plan Withdrawal

Lifelong Learning Plan Withdrawals

RESP Withdrawals

RDSP Withdrawals

TFSA Withdrawals

Apprenticeship completion grant

Rental Property (attach rental income and expense details)

Address

Tax Shelters (attach supporting documents)

U.S. Income

Number of days in the US in the past three years 2009 2008 2007

Type of income received: ☐ Employment ☐ Business ☐ Interest ☐ Inheritance ☐ Other

Attach supporting documents

EXPENSES (include receipts)

Child Care Expenses $		
Child Support Payments (attach copy of separation/divorce agreement) :		
Name	SIN#	Amount Paid $
Charitable Donations $	Were any donations made of publicly-listed securities	
Medical Expenses & Private Health Insurance Premiums $		
Moving Expenses $		
Professional Dues $		
Safety Deposit Box $		
Salesperson's Expenses (attach Form T2200) $		
Tuition Payments (attach Form T2202) $		
Union Dues $		
Political Contributions $		
Adoption expenses $		
Public transit passes $		
Child fitness programs $		
Home Renovation Tax Credit – Please provide copies of all receipts for expenses related to work performed and goods purchased between January 28, 2009 and January 31, 2010.		
Were you a first-time home buyer in 2009?		
If a family member's RRSP or RRIF decreased in value between the date of death and the date of distribution please provide form RC249 from financial institution.		

ALLOWABLE BUSINESS INVESTMENT LOSS (ABIL)

Did you sell shares to a non-related person at a loss?	☐ Yes ☐ No			
Is an outstanding loan to you by a corporation uncollectible?	☐ Yes ☐ No			
If Yes to either question, document the details for your Allowable Business Investment Loss				
FOR THE SMALL BUSINESS CORPORATION		D	M	Y
Name				
Date of Bankruptcy, Insolvency, or Wind-up				
FOR THE SHARES				
Class of Shares	Number of Shares			
Date of Purchase				
Adjusted Cost Base $				
FOR THE DEBT				
Type of Debt				

Date of Acquisition			
Adjusted Cost Base $			
Proceeds of Disposition $			
Amount of Your Loss $			

TRANSFERS TO SPOUSE ON SEPARATION

	D	M	Y
Your Spouse's Name SIN			
Property That You Transferred			
Transfer Date			
Separation Agreement Date			
Consent to file Election	☐ Yes		☐ No

CHECKLIST FOR THE SELF-EMPLOYED

CHECKLIST FOR THE SELF-EMPLOYED	✓	$
Advertising	☐	
Convention Expenses	☐	
Disability Modifications	☐	
Insurance	☐	
Interest	☐	
Interest and Borrowing Charges	☐	
Health Plan Premiums	☐	
Home Office	☐	
Square Footage of Home Office Space and Total Home Footage	☐	
Rent or Mortgage Interest	☐	
Property tax	☐	
Home Insurance	☐	
Annual Utilities		
• Heat	☐	
• Hydro	☐	
• Water	☐	
• Cable & Internet	☐	
• Telephone & Internet	☐	
Maintenance and Repairs	☐	
Leasing Costs	☐	

Meals & Entertainment Expenses	☐	
Automobile		
• Own or Lease	☐	
CHECKLIST FOR THE SELF-EMPLOYED (cont'd)	**✓**	**$**
• Was There a Change in the Tax Year (Details)	☐	
• If Lease, Lease Cost Per Month	☐	
• If Own, Interest Cost Per Month	☐	
• Odometer @ Beginning of Year	☐	
• Odometer @ End of Year	☐	
• Percentage of Business Use of Car	☐	
• Fuel Expenses	☐	
• Car Insurance	☐	
• Repairs and Maintenance	☐	
• Parking expenses	☐	
• Highway Tolls	☐	
• License and Registration	☐	
•	☐	
•	☐	
Equipment Purchases Subject to CCA		
• Furniture and Equipment	☐	
• Computer Equipment	☐	
• Leaseholds (if rental property)	☐	
Office Expenses		
• Telephone & Fax	☐	
• Stationary Supplies	☐	
•	☐	
•	☐	
•	☐	
Professional Membership Dues / Fees	☐	
Accounting Fees	☐	
Legal Fees (state nature of)		
•	☐	
Salaries Paid (provide T4 Summary for 2009)	☐	
Travel Expenses	☐	
List Other Expenses		

•	☐	
•	☐	
•	☐	
•	☐	

UNIVERSAL CHILD CARE BENEFIT

If you had a dependant child under the age of 6 in 2009 and did not receive this benefit of $100 per month please inform us so the proper documents can be prepared.

PROVINCIAL TAX CREDITS

Provide details for the following available credits:

ONTARIO: Details of property tax, rent or college/university residence payments, labour-sponsored investments tax credits, political contributions, apprentice training tax credits and co-operative education tax credits (provide receipts).

NEW BRUNSWICK: Details of political contributions, labour-sponsored venture capital fund tax credits and small business investor tax credits (include receipts).

NOVA SCOTIA: Details of N.S. Home Ownership Plans, equity tax credits, labour-sponsored investment tax credits, post-secondary graduate retention rebate, equity tax credits, volunteer firefighters, ground search and rescue tax credits and political contributions (include receipts).

QUEBEC: Details of Quebec Stock Savings Plans, property tax (include relevé 4), political contributions (include receipt), employee stock options and caregiver credits.

BRITISH COLUMBIA: Details of political contributions, employee investment tax credits, mining flow-through share tax credit, venture capital tax credit.

NOTICES OF ASSESSMENT

Please provide copies of all notices of assessment or reassessment and other relevant correspondence from any tax authorities received by you or any family member for whom we are filing returns if not previously provided.

SPOUSES AND CHILDREN 18 OR OVER

It may be beneficial to prepare a tax return for individuals with little or no income as they may be eligible for certain Federal and provincial tax credits. If you wish us to prepare these returns, please provide us with the details.

U.S. CITIZENS AND RESIDENTS

It is imperative that any U.S. citizen be aware that the Internal Revenue Code requires that you file a U.S. tax return annually regardless of the country of your residence. We urge that, if you are not filing this return, you discuss the consequences with us as the penalties are severe. In most cases, the filing of a U.S. tax return will not result in additional income tax costs.

Also, any U.S. citizen having an interest in a Canadian company may be required to file an information return on behalf of the corporation with the IRS.

Any individual spending substantial time in the U.S. may be required to file a U.S. tax return or special election forms exempting them from filing the tax returns. This includes snowbirds that spend the winter in the U.S. If this possibility exists, please discuss the matter further with our office so that we can help determine the filing requirements.

RRSP statements for the year must be provided in order to make the election to defer income earned within the RRSP. Also details of all financial institution accounts held outside of the US must be reported.

It should be noted that U.S. Immigration now checks tax filing information through the IRS at most border crossings and all airports. Failure to file U.S. returns could jeopardize U.S. assets, the ability to collect Social Security and G.I. benefits and entrance to the U.S.