

LESTER LANDAU

Chartered Professional Accountants



רְאָמְלֵר לַנְדָאָו אַרְבֵּי חָשׁוּבִים

Iqaluit

PO Box 20, Iqaluit, NU, X0A 0H0
Tel: 867.979.6603 Fax: 867.979.6493

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Rankin Inlet

PO Box 147, Rankin Inlet, NU, X0C 0G0
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INFORMATION TO ENCLOSE - 2021

Name _____

INFORMATION SLIPS

- Have you enclosed all T4's, T5's and other information slips? Yes No
 Have you enclosed your prior year Notice of Assessment? Yes No

PERSONAL INFORMATION

- Have we prepared your tax return before? Yes No
 Is all personal information the same? Yes No

(If the answer to either question is no, please fill out tax organizer)

OTHER INFORMATION (if any apply, please check off and include the slips or information)

- | | |
|--|---|
| <input type="checkbox"/> Adoption expenses | <input type="checkbox"/> RRSP contribution receipts |
| <input type="checkbox"/> Capital gains or losses | <input type="checkbox"/> Self-employment information |
| <input type="checkbox"/> Charitable donation receipts | <input type="checkbox"/> Spousal support |
| <input type="checkbox"/> Child care receipts | <input type="checkbox"/> Student loan interest |
| <input type="checkbox"/> First time home buyer – Location _____ | <input type="checkbox"/> Student tuition receipts |
| <input type="checkbox"/> Foreign assets > \$100,000 | <input type="checkbox"/> Tax installment payments |
| <input type="checkbox"/> Home Buyer's Plan repayment | <input type="checkbox"/> Teacher's supplies |
| <input type="checkbox"/> Interest expenses for investments | <input type="checkbox"/> Tradesperson's tools |
| <input type="checkbox"/> Medical receipts | <input type="checkbox"/> Travel deduction |
| <input type="checkbox"/> Moving expenses not covered by employer | <input type="checkbox"/> Union or professional dues |
| <input type="checkbox"/> Rental properties – revenue & expenses | <input type="checkbox"/> Volunteer Fire Fighter/Search and Rescue |
| <input type="checkbox"/> Sale of property - Investment property: | |

Sale Price _____ Purchase Price _____ Year purchased _____
 Address _____

- Sale of property - Principal residence:

Sale Price _____ Purchase Price _____ Year purchased _____
 Address _____

- Have you rented your house or a room in your house on AirBnB?
 If you are employed in the hospitality industry (waiter / waitress), did you earn any tips or gratuities during the year? If so how much _____.
 If you are a taxi driver, a GST return must be filed. Are we to complete these? GST# _____
 Did you work from home in 2021? If so, please fill out our work from home sheet.

Other Information



PERSONAL TAX ORGANIZER
YEAR(S) _____

Mr. Mrs. Ms.

First Name: _____ **Last Name:** _____

Mailing Address: _____

Social Insurance Number: _____ **Date of Birth:** _____ (y/m/d)

Phone: Home: _____ My Work: _____ My Cell: _____

Email Address: _____

Have we prepared your tax return before? Yes No

Marital Status: Single Married Common Law
 Divorced Separated Widow(er)

If your marital status changed during the year provide the date of change _____ (m/d)

Spousal Information (if applicable):

Name: _____ SIN #: _____

Date of Birth: _____ (y/m/d) Net Income if not preparing return _____

Work Phone: _____ Cell: _____ Email Address: _____

Dependent Children (who live with you):

Name	Relationship	Date of Birth (y/m/d)	Income
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

The following questions must be answered before your return can be e-filed:

Do you want your email address provided to CRA for online mail? Yes No

Did you sell your residential home or other property in the current year? Yes No

Are you/spouse Canadian citizen(s)? Yes No

Do you agree to the Canada Revenue Agency providing your name, address and date of birth to Elections Canada to keep the national voters list up to date? Yes No

Do you own foreign property at any time during the year with a cost of more than CAN\$100,000? Yes No

NORTHERN RESIDENCE DEDUCTION

Did you live in Nunavut since January 1st for the year(s) filing? Yes No

If you answered no, please provide us with your former address and the date you moved here or left.

Did you have housemates or roommates? Yes No

If you shared accommodations with others, provide a list of people who lived with you (including your spouse but not including dependent children). Are any of them claiming a Northern Deduction? If so, how much are they claiming? Full = Basic claim per day plus the additional claim per day for the house / apartment that you live in.

Note: If any person in the household has claimed Full then no one else can claim anything.

Name _____ Claiming deduction? Full Basic None

Name _____ Claiming deduction? Full Basic None

TRAVEL DEDUCTION

Did your employer report a travel benefit in Box 32 of your T4 slip? Yes No

Did you travel or go on vacation? Yes No

If yes to both questions, please complete the separate **Travel Deduction Form** (enclosed).

DIRECT DEPOSIT

Does CRA have your banking information? Yes No

If no to the above, provide banking information to change the account CRA has or start the direct deposit.

Transit/Branch# _____ Bank/Institution Code _____ Account# _____ Taxpayer

Transit/Branch# _____ Bank/Institution Code _____ Account# _____ Spouse

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Working-from-Home Deduction 2021

Name: _____

Due to the COVID-19 pandemic many people began working from home. Because of this, the CRA has introduced new methods for claiming a deduction for home office expenses for the 2021 tax year. To determine if you are eligible to claim this deduction for the 2021 tax year, please answer the following questions:

Did you work from home at any point during 2021 due to COVID-19? YES NO

Were you required to pay expenses relating to working from home that were not, and will not be, reimbursed by your employer? YES NO

If yes, was there a period of at least four (4) consecutive weeks in which you were working from home more than 50% of the time? YES NO

If you answered yes to all the above questions, you qualify to claim the deduction for home work expenses in 2021 using the SIMPLIFIED method. If you were working from home for reasons **other than** COVID-19, please indicate here

CLAIMING THE SIMPLIFIED METHOD

You are eligible to claim the simplified method if you meet the above eligibility requirements. The simplified method uses a flat rate of \$2 for each day you worked from home, up to a maximum of \$500.

Please provide the total number of days you worked from home in 2021: _____ x \$2 = _____ (maximum of \$500)

If you are planning to claim using the detailed method, there are additional forms that need to be completed. Please indicate to one of our staff that you would like to claim using the detailed method and we will provide the forms to you.

Taxpayer Signature: _____

Date of Signature: _____

TRAVEL DEDUCTION - T2222

If you have an amount in box 32 of your T4 Slip, you are allowed to deduct travel for up to two vacation trips per year for yourself and each member of your household. Each member of the household is limited to two trips per year regardless of the number of box 32's per household. If you have an amount in box 33 of your T4 slip you may claim an unlimited number of medical trips.

PLEASE COMPLETE A SEPARATE FORM FOR EACH TRIP.

Trip # _____

Destination: _____

Purpose of trip: Vacation Medical

Names of people traveling:	Departure date	Return date	# of trip days
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
	Total Number of Days		_____

TRIP EXPENSES

Airfare (attach tickets)	
Hotel (attach receipts). See Note 2	-
Meals (\$69 per person per day for 2020) Note 3 <small>Less - All inclusive days</small>	-
Car rental (attach receipts)	-
Other (attach receipts). See Note 1	-
Total actual cost of trip	_____

- Note 1:** Other may include taxis, excess baggage, fuel for vehicles, ferries, train, bus, shuttles, etc.
Note 2: Hotel can only include the cost of the room and parking plus all applicable taxes.
Note 3: Meals are \$51 per person per day for 2019 and prior years.

Airfare	Hotel	Car Rental	Other

