

INCOME TAX INFORMATION FORM (FAQ'S attached)

Please print legibly

Please review entire form and complete sections that are applicable to you.

Personal Information - *If your spouse has also declared bankruptcy a separate Information Form must be completed*

Name		Social Insurance Number	
Address		Email Address	
City	Province	Postal Code	
Date of Birth (dd/mm/yyyy)	Work Phone	Home/Cell Phone	

Marital Status

Marital Status as at December 31 <input type="checkbox"/> Single <input type="checkbox"/> Common-Law <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Married <input type="checkbox"/> Widowed <i>Per Canada Revenue Agency's interpretation: "Common-law" means you have been residing together over the last 12 months or if you have a child together, you are considered common-law from the day you begin residing together.</i>
If your marital status changed during the year please enter the date of change: (dd/mm/yyyy)

Spousal Information (If applicable) - *Even if your spouse is not bankrupt, this information is **required** Note #1 - FAQ in order for Canada Revenue Agency to calculate your Canada Child Benefit and GST refund correctly and to allow for any spousal credits that may be available to you. **Failure to provide this information will affect your GST and Canada Child Benefit. CRA requires this in order for us to submit your return.***

Spouse's Name:	Social Insurance Number:
Date of Birth (dd/mm/yyyy)	Net Income per Line 23600 of their Tax Return (If not bankrupt):

Dependant Children (If applicable)

Name	Birthdate (dd/mm/yyyy)	Relationship	

Do you claim childcare expenses? (if so, include receipts)
 Yes No

Who claims the Canada Child Benefit for the children, if applicable?
 I claim it My Spouse

Do you claim a child or dependant for the ED credit? (amount for an eligible dependant) Yes No Child: _____

Note #4 - FAQ

CANADIAN CITIZEN (yes/no) _____

MEDICAL DEDUCTIONS provide us with the total of all of your medical receipts. **If your receipts are not totaled, they will not be included in the processing of your return.** If you have sent in your medical receipts with your monthly statements, please obtain a print-out from your pharmacy.

DONATIONS Attach receipts for donations made during the year and provide us with the total.

TUITION AMOUNT If you are claiming a tuition amount for yourself, please attach the **T2202** received from the institution you attended. If you are claiming a tuition amount for a dependant, complete the required information with respect to the dependants income and have the dependant sign the T2202 and attach the completed form.

TUITION CARRY FORWARD - Do you have tuition available to carry forward to your 2023 return? Yes No
Please provide a copy of your **2022 Notice of Assessment**.

PENSION INCOME SPLITTING If you are splitting the eligible pension income between you and your spouse, complete and attach **Form T1032** which is signed by you and your spouse. The form is available online. (<https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/t1032.html>) If the signed form is not included we will not be able to split the pension income when we process your return.

HOME BUYER'S PLAN Amount required to be repaid under the Home Buyer's Plan for the year: \$ _____
Please provide a copy of your **2022 Notice of Assessment**.

LIFE LONG LEARNING PLAN Amount required to be repaid under the LLP for the year: \$ _____
Please provide a copy of your **2022 Notice of Assessment**.

ALIMONY/SPOUSAL SUPPORT - Details (**Full Amount Paid or Received in 2023, From Whom or To Whom.**)
Attach a copy of the written or court agreement. **Note #5 - FAQ** \$ _____
Do you have an outstanding debt to Family Orders? Yes or No

TRUCK DRIVER If you are claiming for meals and lodging expenses please attach a completed Form TL2. The form is available online. If not complete, the deductions will not be included in the processing of your return. Do not send your logbooks.

ONTARIO & MANITOBA RESIDENTS: (OTB) & (MTB) Please confirm address, number of months resident for the year, the amount of rent and/or property taxes paid for the year, and name of landlord, municipality or supplier to whom payment was made, as applicable.

Address: _____ Amt of Rent/Property Tax _____ # of months _____

EMPLOYER/SOURCE OF INCOME Please list your sources of income and period covered (before or after your bankruptcy).

Employer (2023): _____ Dates - From: _____ To: _____

Employer (2023): _____ Dates - From: _____ To: _____

Employer (2023): _____ Dates - From: _____ To: _____

PLEASE USE THIS CHECK LIST TO ASSURE YOU HAVE <u>INCLUDED ALL NECESSARY SLIPS</u> AND RECEIPTS PRIOR TO SENDING TO US		
T4 (Employment)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T4E (Employment Insurance)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T4A (Pension) (CRB Payments)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T4AOAS (Old Age Supplement)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T4AP (Canada Pension)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T4RSP (RRSP Income)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T3/T5 (Investment)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
T5007 (Social Assistance/Senior's Benefit/Workers Comp)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
RC210 (Advanced Canada Workers Benefit Payment)	<input type="checkbox"/> Yes	<input type="checkbox"/> No (attach slips)
Is your income NIL	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Disability Tax Credit: Have you or any of your family members received a Notice of Determination and are therefore eligible to claim the Disability Tax Credit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Who is eligible?		

RETURN BY: MARCH 15, 2024

Information received after this date is not guaranteed to be filed prior to April 30th

I confirm that I have included all tax slips and info required to prepare my taxes and if an adjustment is needed due to slips not being submitted, a \$50 fee may be charged.

The above information is complete and accurate to the best of my knowledge.

Signature:	Date:
If you do not have access to an online CRA account please contact the office after May 31st, 2024. Notice of Assessments are only mailed on a special request basis.	

**SELF-EMPLOYMENT INCOME or
RENTAL INCOME**
(Only complete and return this section if applicable)

If you earned income from self-employment as a result of carrying on a business or professional service during the year, or if you earned income from a property rental business, you must prepare and send:

- ▶ **Statement of income and expenses for your self-employed or rental business.** The information for income and expenses must be broken into two periods:
 - from January 1st to the date you filed for bankruptcy (the pre-bankruptcy return), and
 - from the date you filed bankruptcy to December 31st(the post-bankruptcy return).
- ▶ **Summarize your self-employment earnings and expenses.** You may fill in the information on the attached sheet or provide us with a statement summarizing your business activities. We will not accept records that do not have a summarization of the income and expenses. The information will be sent back to you for summarizing.
- ▶ **Do NOT send copies of your invoices and receipts for expenses** as they are not required as part of the processing of your return.
- ▶ If you maintained a **home office as your principal place of business**, please summarize the costs of:
 - Heat, electricity, insurance, property taxes, mortgage interest (excluding principle), repairs and maintenance.
 - The total square foot of the residence and the square foot of the business office must be provided as part of the tax return information.
 - The information for home-based business costs must also be broken into two periods:
 - from January 1st to the date you filed for bankruptcy, and
 - from the date you filed bankruptcy to December 31st
- ▶ Use a separate Summary of Self-Employment or Rental Earnings (Loss) for each additional business.
- ▶ Please ensure that all applicable GST/HST returns have been filed up to date. If unsure you can call the CRA business line at 1-800-959-5525. Tax Refunds for the year of Bankruptcy and future tax years will be held if GST is non-compliant.

SUMMARY OF SELF-EMPLOYMENT OR (RENTAL PROPERTY INCOME)

Name of Business	PRE-RETURN Jan 1 st to Day before Bankruptcy	POST-RETURN Date of Bankruptcy to Dec 31 st
INCOME:		
Self-Employment/ Rental	\$ _____	\$ _____
Minus – GST & PST	\$ _____	\$ _____
GROSS PROFIT	\$ _____	\$ _____
 SUMMARIZED EXPENSES: (enter business part only)		
Advertising	\$ _____	\$ _____
Meals & Entertainment (total spent)	\$ _____	\$ _____
Business taxes, licenses, memberships	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Management & Administration Fees	\$ _____	\$ _____
Office expenses	\$ _____	\$ _____
Supplies	\$ _____	\$ _____
Professional Fees	\$ _____	\$ _____
Rent (not home office)	\$ _____	\$ _____
Maintenance and Repairs	\$ _____	\$ _____
Salaries, wages & benefits	\$ _____	\$ _____
Travel Expenses	\$ _____	\$ _____
Telephone and Utilities	\$ _____	\$ _____
Fuel costs (excluding motor vehicles)	\$ _____	\$ _____
Motor Vehicle (Fuel)	\$ _____	\$ _____
Motor Vehicle (Other)	\$ _____	\$ _____
Total Vehicle KM for the year: _____	Business Portion of KM for the year: _____	
TOTAL EXPENSES	\$ _____	\$ _____

PRE-RETURN
 Jan 1st to Day before Bankruptcy

POST-RETURN
 Date of Bankruptcy to Dec 31st

Calculation of Home Office Expense (Please use 100% amounts)

Heat	\$ _____	\$ _____
Hydro	\$ _____	\$ _____
Insurance	\$ _____	\$ _____
Maintenance	\$ _____	\$ _____
Mortgage Interest	\$ _____	\$ _____
Rent (Ont & MB only)	\$ _____	\$ _____
Property Taxes	\$ _____	\$ _____
Other Expenses _____	\$ _____	\$ _____
Square footage of home: _____	Square footage of space in home used for office: _____	
TOTAL HOME OFFICE EXPENSES	\$ _____	\$ _____