

**PERSONAL INCOME TAX CHECKLIST**

B. Lyons & Company Inc.

Please call if you have questions and when you are ready to make an appointment to come in

350 23rd St E

**Enter information in the blue boxes & bring slips/receipts**

[In Excel click here to send your documents securely](#)

North Vancouver, B.C. V7L 3E5

Name:   
 Address:

Current Email:

Tel: (604) 649-9199

Email: [accountant@lyons.pro](mailto:accountant@lyons.pro)

Do you rent your residence? Y/N  
 Change in marital status? (Common law questionnaire) Y/N

Current phone:   
 Change of dependants?

CAD Residency status?  
 US Citizen?

**Tax slips and Income - check if applicable**

**Employee home office amounts (T2200 signed by employer)**

**Rental income? (please provide details by property)**

First Home Savings Account open? Contributions?  
 T4 – employment income  
 T4A – contract, pension, annuity & miscellaneous income  
 T4E – employment insurance & other benefits  
 T4A(P) – Canada Pension Plan  
 T4A(OAS) – Old Age Security  
 T4RIF – RRIF income  
 T4RSP – RRSP withdrawals  
 T5007 – Workers Compensation & other benefits  
 Stock options vested/exercised?

Rent paid  
 Maintenance expenses  
 Hydro  
 Gas  
 Water  
 Other (provide details separately)

Co-owned? (Y/N)

**Investment income & expenses? - check if applicable**

**Commission Employees (T2200 signed by employer)**

**Address(es)**

T3's – Mutual funds and trusts (March 31)  
 T5 – Investment (Interest/dividend) income (Feb28)  
 T5008 –Securities transactions (stocks, bonds, mutual funds)  
 T5013 – Partnership income (March 31)  
 T600 – Canada Savings Bonds  
 Brokerage account statements for the year (all)-Do NOT include RRSP, RESP, RRIF, TFSA  
 Interest on investment loans  
 Do you own Tbills, strip bonds, CSB's, long term bonds?  
 Other investment income or expenses  
 Accounting, management, investment counsel fees  
 Did you dispose of, or change use of, ANY property?

Insurance  
 Property taxes

Rent collected

**Business use of home**

Advertising

**Other income? Check if applicable**

Mortgage Interest paid  
 Office Sq Ft/M  
 Home Sq Ft/M

Insurance

Alimony/Child Support/Maintenance  
 Self employment income-Please use Lyons Excel template to summarize income and expenses  
 If you have foreign source income, or ANY assets/accounts outside of Canada please discuss with Belinda

**Employment expenses? (T2200 signed by employer)**

Maintenance & repairs

**COVID19**

Mortgage interest

**Did you repay COVID relief payments?**

Did you repay COVID relief payments?

Property taxes

**Trusts**

Utilities

**Are you party to any trust accounts, including bare trust?**

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Travel (if own more than one property)

**Auto expenses? (business or employee with T2200)**

**Auto expenses? (business or employee with T2200)**

Office expenses & supplies

Business kms / Total Kms

Business kms / Total Kms

Legal/professional/accounting fees

Gas & oil

Gas & oil

Suite in home? Y/N

Insurance & registration

Insurance & registration

Suite Sq Ft/M

Loan interest

Loan interest

**Other expenses ? Check if applicable**

Lease payments

Lease payments

Charitable Donation (up to 5 years)

Maintenance & repairs/BCAA

Maintenance & repairs/BCAA

Child care receipts (name/address/SIN of payee)

Lease start date

Lease start date

Tuition (T2202)

Purchase date

Purchase date

Medical/Dental receipts

MSRP of new auto (lease or purchase)

MSRP of new auto (lease or purchase)

Moving expense receipts (40km or more closer to work/school)

Trade in/Sale price

Trade in/Sale price

Professional/union dues receipts

**IF YOU HAVE A LOT OF RECEIPTS PLEASE ASK FOR OUR EXCEL TEMPLATE TO LIST THEM**

**Miscellaneous - Check if applicable**

✓ Last tax year notice of assessment

February notice showing total instalments paid

Volunteer firefighter or search and rescue?

Does anyone in your household live with a disability?

Is your home address different from your mailing address?