

# 2022 Tax Year Checklist

EXISTING CLIENTS

## Changes you need to know about:

- **If you plan to come by the office to drop off your taxes, please call to arrange a time.**
- If you have donations or medical receipts, please add up the totals and note it on top of the stack of receipts.
- We are on a new 3-week turnaround schedule.
- Please submit your tax documents electronically (by email or fax).
- If you have a non-registered account at YF, please forward your taxes **after** April 1<sup>st</sup> 2023.
- Do you have a non-registered account outside of YF? Please provide copies of your gain/loss statement.

**We will automatically generate PDF returns. Paper copies are an extra \$5.**  
**PAPER  Mail to my home (~\$4)  Express Post \$24**

## YOUR INFO

Your Name	Phone
Spouse Name	Spouse Phone

## ANY CHANGES SINCE LAST YEAR?

Your Name	Your SIN
Spouse Name	Spouse SIN/DOB
Your Email	Spouse Email
Address for Tax Return:	

LIVING IN BC on December 31 <sup>st</sup> , 2022? Yes <input type="checkbox"/> No <input type="checkbox"/> If not, where:
MARITAL STATUS: Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Common Law <input type="checkbox"/> Date of Change [d/m/y]:
CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/> SPOUSE CANADIAN CITIZEN? Yes <input type="checkbox"/> No <input type="checkbox"/>
FOREIGN PROPERTY / INVESTMENTS more than \$100,000 Canadian \$
SOLD PROPERTY? Please complete our new Home Sale Checklist
BOUGHT PROPERTY? Yes <input type="checkbox"/> No <input type="checkbox"/> Purchase \$

## IF WE ARE NOT DOING YOUR SPOUSE'S TAXES

Spouse Name	2022 Estimated Earnings \$
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## DEPENDENTS

Name / DOB / SIN	Name / DOB / SIN
Tuition	Tuition
Childcare Expenses	Childcare Expenses
Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>	Disability Tax Certificate? Yes <input type="checkbox"/> No <input type="checkbox"/>

## OTHER DOCUMENTS / RECEIPTS in addition to the regular T-Slips, please provide:

Union Dues	T5008 (gain/loss)	Dec. 31 Investment Statements [gain/loss]
T2200 [employment expenses]	Commissions [NOT on T4]	Spousal Support Paid/ Received /Taxed?
T2202 (tuition receipt)	Server Tips \$	YF Checklists (Moving/Rental/Medical)
Student Loan Interest Paid	Donations	Regular T-Slips: T4, T4A, T3, T5, T4RSP, T4RIF, T4OAS, T4AP

## PRICING Revised pricing listed below. Reflects investing client discount

	Investing Client	Tax Only Client		Investing Client	Tax Only
Basic Return [ <i>this sheet</i> ]	\$70	\$100	Foreign Income Worksheet	\$100 *	\$150 *
Medical Expenses	\$60 *	\$90 *	GST Return	\$80 *	\$125 *
Moving Expenses	\$100 *	\$150 *	Capital Gains	\$100 *	\$150 *
Rental Income	\$200 *	\$300 *	Extra Time (per hour)	\$200 *	\$220 *
Airbnb Rental Income	\$300 *	\$400 *	USA Tax Doc's Prep Fee \$100		
Business Income	\$300 *	\$400 *	* We may charge more if complex + if no worksheets		
Employment Expenses	\$120 *	\$170 *	<b>We accept: e-transfers, credit cards &amp; cheques</b>		