

Thank you for 12 Years!

You have made our last 12 years wonderful and we appreciate your business! We welcome our new clients from the London and surrounding areas to Atum FS!

We look forward to many more years with you!



IS NOW



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New London Office!

6-1304 Commissioners Rd. W., London, ON, N6K 1E1
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Tax Time is around the corner!

2021 reminder list for your taxes. We will need:

General Items

- Your current contact info
- Copy of any foreign tax return filed (U.S. citizens must file U.S. returns)
- 2019 Notice of Assessment & other years' reassessments
- Your personal status such as dates of marriage, separation, divorce or widowed, births & deaths
- Names & SIN of spouse & dependents
- Note consenting to provide your income tax information to Elections Canada
- Installment payments made, if any
- Details of foreign property holdings (if any*) (T1135**)
- Contact details & consent to discuss your investments with any advisors
- Details of lawsuits settled in 2020
- Support & settlement details resulting from matrimonial changes, if any
- TFSA statements, (limit increased to \$6000)
- Work from home expenses/Declaration of conditions of employment form (T2200s, T2200)
- Disability tax credit claim form completed by doctor (T2201)
- Direct deposit information

Income Details

- Employment income (T4)
- Pension income (T4A, T4A(P), T4RIF, T4RSP)
- Old age security (T4OAS)
- CERB/CRB Income (T4A)
- Investment income (T5)
- Income from trusts such as mutual fund investments (T3)
- Income from employment insurance (T4E)
- Income from partnerships (T5013)
- Workers compensation/social assistance payments (T5007)
- Details of the sale of securities such as stocks & bonds (eg. realized gain/loss report from your broker), possible T5008 slips
- U.S. social security & any other foreign pensions
- Details of real estate sales & purchases
- Income from foreign investments
- Child/Spousal support payments received
- T4As for any miscellaneous income received during the year
- T4PS (profit sharing) Deductions – Employees
- Business, Farm, Fishing & Other income (Tips, casual income)

Deductions – Motor Vehicles, IF ELIGIBLE*

- Total kilometers driven & kilometers driven just for work
- Details of total expenses
- New vehicle, purchase invoice/agreement

Deductions – General

- Digital news subscriptions (NEW!)
- RRSP contributions (Contribution deadline March 1st, 2022)
- Medical, dental, prescription drugs, nursing home expenses, fertility costs, trained animal aids for impairments (pharmacies will print your tax receipts for each family member)
- Home Renovations for Seniors/Disabilities
- Payments to a private health insurance plan
- Charitable donations
- Tuition fees/education amount/Exams fees for professional certification (T2202A for Canadian & TL11 for foreign universities) for yourself or transferred from a dependent, signed by student
- Interest paid on student loans
- Professional dues & insurance, union dues
- Eligible supplies expenses & certificate for Teacher/Educators
- Interest on loans to purchase investments
- Professional consultant fees
- Legal fees paid to establish spousal support or to enforce a pre-existing agreement
- Legal fees paid to recover wages from your employer
- Details of people you support & their medical status
- Child care/day care receipts (if for camp, list dates attended)
- Non-reimbursed moving expenses if you moved 40 km or closer to a new work space location
- Property taxes or residential rent paid (if joint couples income under \$45K)
- Political contributions receipts
- Child/Spousal support payments paid
- Adoption expenses
- Expenses not reimbursed by your employer
- If you are a commissioned salesperson, details supporting advertising expenses, promotion, meals & entertainment
- TL2 meals & lodging for transportation employees
- Trades people & apprentice tool purchases, if eligible
- Volunteer Firefighters Certificate

Unincorporated Businesses/Sole Proprietors

- Software backup of bookkeeping records, if computerized (include password)
- Manual book keeping records
- Total sales revenue and receipts for the year, if books not kept
- Total expenses listed by category for the year or receipts, if books not kept
- Capital assets acquired (eg., computers & peripherals, furniture & equipment)
- Home office expenses, rent
- Partners' names, addresses, SINs & per cent interest

Rental Properties

- Address & number of units
- Rental income by unit
- Rental expenses by unit & by category of expense
- Partners' names, addresses, SINs & percent of ownership
- Details of any capital additions over \$500, including furnishings & appliances