**Corporate Information**

* NAME

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Operating Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Business Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Alberta Corporate Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Phone # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Shareholder # 1:**

* NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* SIN \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Date of Birth (mm/dd/yy) \_\_\_\_\_\_\_\_\_ Gender \_\_\_\_\_\_\_
* Shareholder / Director Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Phone # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Canadian Citizenship \_\_\_\_ Yes \_\_\_\_ No

**Shareholder # 1:**

* NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* SIN \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Date of Birth (mm/dd/yy) \_\_\_\_\_\_\_\_\_ Gender \_\_\_\_\_\_\_
* Shareholder / Director Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Phone # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Canadian Citizenship \_\_\_\_ Yes \_\_\_\_ No

### Information required

* Last year’s Notice of Assessment
* Last year’s Financial Statements
* Last year’s corporate income tax return
* RC59 Corporate Consent with CRA
* Alberta Corporate Consent

### Employment Related Expenses

* Travel/Auto – Records of expenses and calculation of Business Mileage
* Home Office Expenses

### Investment income

* T3 for Trust or Mutual Fund Income
* T5 for Investment Income (interest, term deposits or G.I.C’s, Dividends)
* T5013 Partnership Income
* Royalty or other investment income – Details
* Foreign interest or dividends – foreign slips
* T5008 or other information

### Sale/exchange of investments

* Stocks, bonds, trust units – Transaction slips/details, broker statements***, statement of unrealized gain/loss on non-registered funds***
* Real Estate and Other Properties – Full Details
* Gifted Properties – Full Details
* Elections in Prior Years(s) – Full Details
* Cryptocurrency or Bitcoin transactions
* Prior year Reserves – Full Details

### Investment expenses

* Money borrowed to earn Investment Income
* Accounting Fees
* Investment Counsel and Management Fees

### income

* Record of all Revenue & Expenses
* T5018 (for subcontractor payments)
* Assets purchased, sold during year – Full details
* Salary paid to shareholders
* Inventory – Closing Value
* Any Special Elections in Prior Years
* **Please indicate if you have internet business activities and indicate your website address and % of income generated from the internet**
* deductible as employment expense)

### rental income

* Records of all Revenue & Expenses
* New Properties – Purchase agreements & details
* Rental of Part of Residence – Details of Split
* Change of use of Rental Property – Date & Details
* Sale of Rental Property – Sale and Purchase Details
* Mortgage interest details

### Farming income

* Records of all Revenue & Expenses
* New Properties/assets – Purchase agreements & details
* Value of Purchased Livestock on hand at December 31?
* Value of Raised Livestock on hand at December 31?

### Foreign property

* T1135 to be completed if property owned (includes cash, stocks, trusts, partnerships & real estate) COST more than $100,000. Required details include description of property, related country, maximum cost in the year, and cost at year-end, capital gain/loss per each particular country.

### please note

* **Address Change** – Please provide a new mailing address or if your place of business changed during the year (and is different from address with CRA)
* Direct Deposit Form completed

**Comments or Additional Information:**