Don allen & ASSOCIATES inc.
Road to Recovery

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INCOME TAX INFORMATION

- Don Allen & Associates Inc. files two tax returns in the year of your bankruptcy – one from January 1 of the year of bankruptcy to the date of your bankruptcy. This is called a Pre-bankruptcy return and it is filed with information you provide the Trustee at time of filing bankruptcy.
- A Post-bankruptcy tax return is filed by March 15th of the year following bankruptcy, using the tax information you receive (usually by the end of February of the year following bankruptcy).
- For the Pre-bankruptcy return, at the time you sign your paperwork with us when you file bankruptcy, please provide us with pay stubs showing your year-to-date gross pay and deductions made for this year of your bankruptcy.
- If these are not available, provide us with copies of any payment stubs you received or copies of your bank statements showing deposits made.
- If you have not already done so, please provide us with a copy of your last tax return filed (if you have it) plus a copy of the tax assessment you received from Canada Revenue Agency (CRA).

- Please complete the following information, to the extent it applies, and provide it to us. This is a requirement of your bankruptcy and will affect your discharge and your ability to collect child tax benefits and HST credits, if these are applicable to you.

- Please complete this form and return it with original tax slips received.

Name__________________________________**Address**______________________________________

Marital status December 31, last year _________________________ If spouse is also bankrupt, fill out a separate copy of this form. If not also bankrupt, please fill in the following:

Spouse's Name ____________________________ **Spouse's SIN** ________________________

Spouse date of birth: Year________ Month ______ Day ______

Spouse's total gross income $________________________

If marital status changed during last year, please give date of change ________________________

If separated during last year, you must provide spouse's gross income to the date of separation above.

Children / Dependents Do you qualify for claiming the "equivalent to spouse" for one of your dependents? YES__________ NO _____________

NAME	DATE OF BIRTH Yr / Month / Day	RELATION	RESIDE WITH YOU Yes	 No
__________________________	_______________	___________	______	_______

<u>SUMMARY OF INFORMATION SLIPS</u> – Please attach one copy of all tax information slips, keeping any duplicates for your records, such as

T4	Employment Income Benefit	**RC62**	Universal Child Care Benefit
T4AP	Canada Pension Plan Benefit	**T5**	Investment Income
T4OAS	Old Age Security	**T5008**	Investment from Securities
T4RIF	Registered Income Fund income	T5007	Workers' Comp./Social Assistance
T4RSP	RRSP Income		

What months during last year did you receive income from the following source?

T4E Employment Insurance - All Year or income received from ___________ to ___________

T4A Pension, retirement, Annuity - All Year or income received from ___________ to ___________

Other income - All Year or income received from ___________ to ___________

<u>CHILD CARE EXPENSES</u>

Name of child	Caregiver	SIN#	Address	Amount
_______________	_______________	___________	________________________	$__________

_______________ _______________ ___________ ________________________ $__________

CHILD SUPPORT

Name of child or children ____

Paid to: (Name):__________________SIN# ____________ Address ________________________

Paid to: (Name):__________________SIN# ____________ Address ________________________

Period for which these payments were received or paid:____________________Total $_________

SPOUSAL SUPPORT (Taxable) Attach Spousal Support Payments or Receipts. Total $_______

Paid to: (Name):__________________SIN# ____________ Address ________________________

Paid to: (Name):__________________SIN# ____________ Address ________________________

Period for which these payments were received or paid:____________________

ELIGIBLE FOR DISABILITY DEDUCTION YES __________ NO _________

SPLIT PENSION INCOME – If you are splitting eligible pension income between you and your spouse, please provide 2 signed copies of Form T1032E, which is available at your local CRA tax office or online. Do not complete the allocation of the pension income to be split – we will do this when we process your returns.

TUITION AMOUNT – If you are claiming a tuition amount for yourself, please attach the receipts. If you have any unused tuition expenses carried forward from a prior year, please indicate the federal and provincial amounts carried forward. If you are claiming a tuition amount for a dependent, please include the T2202 form and complete the information with respect to the dependent's income and have the dependent sign the form.

MEDICAL DEDUCTIONS – Attach a print-out from your pharmacy or receipts with total.

DONATIONS – Attach receipts for donations made.

RENT OR PROPERTY TAXES -

Indicate which – Rent _____ or Property Taxes ___________

Paid To:	**Nos. Months**	**Amnt. Per Month**	**Total $**
______________________	____________	____________________	____________________
______________________	____________	____________________	____________________

SELF EMPLOYMENT INCOME OR RENTAL INCOME – from carrying on a business during the tax year.

Summarize your self-employment earnings and expenses below, splitting it into Pre and Post bankruptcy.

	Pre – Jan. 1 to Date of Bkptcy.	**Post – Date of Bkptcy to Dec. 31**
INCOME:		
TOTAL INCOME:		
EXPENSES:		

TOTAL EXPENSES:		

Do not send copies of invoices and expenses or your books and records

Do not include the tax return forms from CRA

Please mail or fax back to 866-223-0405