



Rental Personal Tax Information

LEGAL Last Name: _____ LEGAL First Name: _____ S.I.N: _____ D.O.B (YYYY/MM/DD) _____

Full **Mailing** Address: _____ Postal Code: _____

Phone Number: _____ Email: _____

Marital Status

Married Divorced Common-Law Separated Widowed Single

Date of Union/Separation (YYYY/MM/DD) _____ Date of Death (YYYY/MM/DD) _____ Is N&L doing spouse taxes?
 Yes No (if no please provide income): _____

Last Name: _____ First Name: _____ S.I.N: _____ D.O.B (YYYY/MM/DD) _____

Do you have children? Yes No (if yes fill in the table below)

Last name	First name	D.O.B (YYYY/MM/DD)

Who receives child tax benefits:

Do you Pay Receive child support? Yes No (if yes) Amount Monthly: _____ Start date: _____ End date: _____

Do you Pay Receive spousal support? Yes No (if yes) Amount Monthly: _____ Start date: _____ End date: _____

Canadian Citizen? Yes No If no, Citizenship: _____ Did you earn income outside of Canada? Yes No

Did you move provinces in the current tax year? Yes No If yes when: _____

Which province did you reside in on Dec 31st: _____ Did you sell a property? Yes No

As a Canadian citizen do you authorize the CRA to provide your name, address, and date of birth to Elections Canada for the National Register of Electors? Yes No

Is there any other information you wish us to know: _____

Numbers and Letters now have client portals through Ifirm to streamline the process of signing taxes, submitting documents, and proving notice of assessments and T1 Generals. This is a portal that can be accessed all year long to retrieve important tax information.

Are you interested in registering for a Client Portal? Yes No If yes please ensure the email listed above is up to date.

Rental Personal Tax Information

Renters tax credit You can claim this refundable income tax credit if you meet **all** of the following conditions:

- You rented and occupied a rental unit for at least six months in a calendar year in British Columbia
- You are 19 years of age or older, married or in a common-law partnership, or a parent of a child
- You were a resident of British Columbia at the end of December 31 of the year for which you are claiming the credit

If you have a spouse or common-law partner, only one credit can be claimed per couple even if both rent their own homes. You are **not** eligible for this credit if **any** of the following conditions apply:

- You were confined to a prison or a similar institution at the end of the year and you have been confined for more than six months in total for the year that you are claiming the credit
- You were an employee of a foreign country or a family member or a servant of the employee of a foreign country

The following amounts are not considered as rent for the credit:

- A rent that was paid to someone related to you
- A rent paid for a campsite, moorage or manufactured home site
- The rent on accommodation your employer paid for, unless the amount was included in your income for the year
- Rent paid under a rent-to-own plan

Do not claim this credit on a return for a person who died in the year for which the credit is claimed.

IF YOU ARE ELIGIBLE for the credit, please fill in the information below

Address	Months at address (in 2024)	Total rent paid	Landlord/Company name



Rental Personal Tax Information

Rental Property Address: _____

Postal Code: _____

Sole Owner Partnership Number of Units: _____

Partner Information

Last Name: _____

First Name: _____

S.I.N: _____

D.O.B (YYYY/MM/DD) _____

Full **Mailing** Address: _____

Postal Code: _____

Expense Checklist:

If the rental is in primary residence _____ Sq ft Used to earn rental income, _____ Sq ft Total.

- Insurance Bank charges Office expenses Professional fees Management and Administration fees Repairs and Maintenance Property taxes Travel Utilities Mortgage Interest Supplies

Other: _____

Motor vehicle expenses: _____ KM driven to earn rental income. _____ KM total driven in the tax year.

Make: _____ Model: _____ Year: _____

- Fuel Insurance Maintenance Registration Interest Lease (if applicable)

*Please note all motor vehicle expenses in the event of an audit require a log book as proof of use to earn income.

Disposition of Rental Property:

Date of Disposition (YYYY/MM/DD) _____

Date of Acquisition (YYYY/MM/DD) _____

Purchase Price: _____

Sale Price: _____

Cost of Disposition: _____

_____ \$ _____ \$ _____ \$ _____

Principal residence designation

- I designate the property as my principal residence for all of the years that I owned it or for all of the years that I owned it except one year.
 I designated the property as my principal residence for some but not all of the years that I owned it.
 I designated the properties as my principal residences for some or all of the years that I owned them.

By signing below, you acknowledge all the information given above in confidence to Numbers & Letters Business Solutions Ltd to be true and accurate. Numbers and Letters is a certified tax preparation service, however, the CRA makes all final decisions, assessments, adjustments, or audits. By signing this you are releasing Numbers and Letters Business Solutions Ltd. of liability, you acknowledge that any changes made by the Canada Revenue Agency (CRA) to your tax return prepared by our firm are outside our control and that we cannot be held responsible for any resulting discrepancies or obligations.

Client Signature:

Spouse Signature:

Date (YYYY/MM/DD)

NL Employee signature:

Date (YYYY/MM/DD)