

Personal Income Tax Checklist

Tax Year 20 ____

	YOU	SPOUSE
Name:		
Date of birth:		
Social Insurance #:		
Complete Address:		
Email Addresses:		
Phone #s home:		
work:		
cell:		

Marital status: married____ common law ____ separated ____ single____ divorced____ widowed____

Any change to marital status? _____ Date of change: _____

Dependents:

Name:	Relationship	Date of Birth	S.I.N.	Disabled?	Income

Did taxpayer become deceased during year? _____ Date of Death: _____

Did taxpayer immigrate to or emigrate from Canada during year? _____

Date of entry _____ Date of departure _____

Are you a Canadian Citizen? _____

Do you authorize Canada Revenue Agency to release your name, address & birth date to Elections Canada for purposes of updating the Natioanl Register of Electors? _____

Do you hold investments or real property outside of Canada which originally cost in excess of \$100,000 Cdn? _____

INCOME INFORMATION

Income slips:

- _____ T4 Employment Income
- _____ T4A's Pension, Retirement, Annuity, Old Age Security or Other
- _____ T4RSP Registered retirement savings plan
- _____ T4RIF Registered retirement income fund
- _____ T4E Employment Insurance benefits
- _____ T5 Investment Income
- _____ T5007 Workers compensation or social assistance
- _____ T5008 Securities transactions
- _____ T5013 Partnership income
- _____ T3 Trust income
- _____ RC62 Universal child care benefit
- _____ Other

INVESTMENT INFORMATION

- _____ Annual mutual fund statements for all funds held outside your RRSP or RRIF
- _____ Details of all investment disposals during tax year including information to support original purchase price + cost adjustments
- _____ Details of investments that were subject to 1994 capital gains election, if any

RENTAL INCOME

- _____ Full address, number of units
- _____ Date acquired, purchase price
- _____ Revenue & expenses, including mortgage interest, insurance, property taxes etc.
- _____ Percent of personal usage if any

NOTE: If property was bought or sold during tax year, provide purchase/sale agreement, statement of adjustments from lawyer & price allocation of value between land, building & furniture etc

SELF EMPLOYMENT INCOME	<input type="checkbox"/> Income & Expense details net of GST if registered
	<input type="checkbox"/> GST returns if registered
	<input type="checkbox"/> Inventory at year end of goods purchased and available for sale
	<input type="checkbox"/> Details of capital assets disposed of during tax year, vehicles, equip. or computers
	<input type="checkbox"/> Farmers include inventory of livestock, grain, forage numbers, cost + values.
	<input type="checkbox"/> Agristability supplemental forms.
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EXPENSES-Self employment, Employment or Commission	<input type="checkbox"/> T2200 Statement of allowable expenses signed by employer
	<input type="checkbox"/> Meals & entertainment
	<input type="checkbox"/> Travel, promotion, conferences, dues, telecommunications, supplies, etc.
	<input type="checkbox"/> Vehicle - vehicle mileage log w/total klms & total business klms + operating expenses, lease costs, loan interest, purchase/sale price if bought/sold during tax year
	<input type="checkbox"/> Office in home - total square footage of home & square footage of office used for business use.
	<input type="checkbox"/> Mortgage interest, rent, property taxes, condo fees, utilities, insurance, general repairs & maintenance, etc.
	<input type="checkbox"/> Details of capital assets purchases in year eg. Vehicles, equipment, computers, etc.
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DEDUCTIONS	<input type="checkbox"/> RRSP receipts
	<input type="checkbox"/> Child care w/supporting receipts & SIN of caregiver
	<input type="checkbox"/> Safety deposit box rental if for investment or business reasons
	<input type="checkbox"/> Union/professional dues
	<input type="checkbox"/> Moving expenses
	<input type="checkbox"/> Support payments w/copy of agreement
	<input type="checkbox"/> Accounting fees for investment or business income, investment counsel fees
	<input type="checkbox"/> Legal fees to collect salary, alimony, support
	<input type="checkbox"/> Investment/business interest expense
	<input type="checkbox"/> Tax shelter deductions - tax slips & tax reporting package
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TAX CREDITS	<input type="checkbox"/> Charitable & political donation receipts
	<input type="checkbox"/> Adoption costs
	<input type="checkbox"/> Medical/dental/attendant care expenses w/receipts
	<input type="checkbox"/> Tuition fee receipts, w/dependents income & signatures (T2202)
	<input type="checkbox"/> Disability credit form (T2201) for self or dependent for 1st time claims
	<input type="checkbox"/> Student loan interest statement
	<input type="checkbox"/> Child fitness receipts for children under age 16 (maximum of \$500 per child)
	<input type="checkbox"/> Child art receipts for children under age 16 (maximum of \$500 per child)
	<input type="checkbox"/> Receipts for monthly transit passes
	<input type="checkbox"/> Tradespeople's tools
	<input type="checkbox"/> Volunteer firefighter
	<input type="checkbox"/> First time home buyers
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MISCELLANEOUS	<input type="checkbox"/> Notice of assessments/reassessments for prior years taxes
	<input type="checkbox"/> Tax installment summary or payments information
	<input type="checkbox"/> New client, copies of 2 years prior returns, notices of assessments, carry forward details on donations, losses, RRSP contributions, etc.