



PERSONAL INCOME TAX CHECKLIST

Personal Information:

Name: _____

Address: _____

Phone: _____ **Email:** _____

Date of Birth: _____ **SIN:** _____

Marital Status: Single Married Separated Divorced Widowed Common-Law

Spouse's Net Income: _____
(provide only if we are not preparing the return)

Dependants:

Name	Date of Birth	Net Income	SIN

All Information Slips:

T4, T4A	Employment			Check if Slip is Attached
T4A	Pension Payments from Employer			
T4A (OAS)	Old Age Security			
T4A (P)	Canada Pension Plan			
T4E	Employment Insurance			
T4RSP/T4RIF	Income from a RRSP/RRIF (from a spousal plan? Yes <input type="checkbox"/> No <input type="checkbox"/>			
T3	Mutual Fund and Other Trusts (Excluding RRSP/RRIF's)			
T5	Interest and Dividends			
T5008	Purchase and Sale of Securities			
T5013	Partnership Income			
T4007	Social Assistance, Worker's Compensation			
RC 69	Universal Child Care Benefits			
	Other			

All Official Receipts:

	Registered Retirement Savings Plan Contributions (RRSP)			
	Charitable Donations			
	Political Donations			
	Professional Dues			
T2201	Claiming Disability Credit			
	Tuition Fees			
T2202/2202A	Educations Deduction: * If receipt is from a dependant, please have dependant sign in appropriate place on the form.			

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Other Items:

- Listing of Self-Employment Income and Expense--Include HST Information if Possible
- Listing of Income and Expenses for Rental Property.
- Details of Employment Expenses--Employees Must Attach Form T2200 Signed by Employer
- Particulars Related to Tax Shelters and the Required Forms, including limited partnership investments
- Listing of Investments on which Accrued Interest is Required to be Reported--eg. Compound Canada Savings Bonds, Long-Term GIC's
- Carrying Charges and Interest Paid to Earn Income from Investments--also include Deposit Box Fees
- Details of Disposition of Capital Property (stocks, mutual funds, bonds, etc.) Provide Details of Original Cost, Proceeds and Expenses on Disposition (include broker statements/trading slips and quarterly and year end statements outlining the continuity of each mutual fund. Do NOT include RRSP and RRIF mutual fund transactions).
- Disposition of Real Property (original cost proceeds on sale, purchase date, sale date, ownership
- Support Payments or Alimony Payments Paid or Received--Including the Name, Address and SIN of Payor or Recipient.
- Details Regarding Child Care Expenses
- Details Regarding Eligible Moving Expenses
- Amount of Medical Expenses Paid Personally--Receipts Required
- Property Taxes or Rent Paid in the Year, Including the Number of Months at Each Location, the Address of Each Location and to Whom the Amounts Were Paid
- Amount of Installment Payments Made During the Year (Attach Stat.)
- Copy of Notice of Assessment and Prior Years Reassessment Notices
- Will you Authorize Canada Customs And Revenue Agency to Give your Name, Address and Date of Birth to Elections Canada to Help Keep Up-to-Date Information on the National Register of Electors?

YES
NO