



CHARTERED PROFESSIONAL ACCOUNTANTS

# Personal Tax Checklist

If we did not complete your prior year tax return, please include a copy of the return.

## PERSONAL INFORMATION

Full Name		S.I.N.	Birthdate	Citizenship
Apt./Suite – Building Number Street Name, City, Postal Code				Marital Status
Phone	Cell	Fax	Email	
Any family members disabled? YES <input type="checkbox"/> NO <input type="checkbox"/>		Are you a Northern Resident? YES <input type="checkbox"/> NO <input type="checkbox"/>		

## SPOUSE INFORMATION

Full Name		S.I.N.	Birthdate	Citizenship
If we do not complete your spouse's tax return what is your spouse' estimated net income for the year?		Spouse's Estimated Net Income:		

## CHILDREN INFORMATION

Full Name – Child 1		S.I.N.	Birthdate	Citizenship
Attending Post-Secondary Education? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			Amounts for fitness/arts:	
Full Name – Child 2		S.I.N.	Birthdate	Citizenship
Attending Post-Secondary Education? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			Amounts for fitness/arts:	
Full Name – Child 3		S.I.N.	Birthdate	Citizenship
Attending Post-Secondary Education? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			Amounts for fitness/arts:	

**SALE OF PRINCIPAL RESIDENCE**

Did you sell your primary residence during the year?

Yes

No

**INCOME SOURCES CHECKLIST**

Employment T4 or T4A slips <input type="checkbox"/>	RRSP, DPSP, RPP, RRIF, RESP <input type="checkbox"/>
Pension (T4/T4OAS/T4AP) <input type="checkbox"/>	Estates/Trusts/Mutual Fund T3 <input type="checkbox"/>
Employment Insurance <input type="checkbox"/>	Universal Child Care Benefit RC62 <input type="checkbox"/>
Interest/Dividends/Capital Gains T5/T5013 <input type="checkbox"/>	Capital Gains/Losses Report: <input type="checkbox"/>
Other Investments T5013/T5008 <input type="checkbox"/>	Other: <input type="checkbox"/>

**TAX DEDUCTIONS / CREDITS CHECKLIST (with official receipts)**

RRSP Contribution <input type="checkbox"/>	Student Loan Interest Statement <input type="checkbox"/>
Union/Professional Dues <input type="checkbox"/>	Medical Expenses <input type="checkbox"/>
Child Care Expenses (Incl. Name & SIN of Recipient) <input type="checkbox"/>	Disability Certificate (T2201) <input type="checkbox"/>
Child Fitness/Arts Expenses <input type="checkbox"/>	Charitable Donations (Indicate if gift "in-kind") <input type="checkbox"/>
Moving Expenses <input type="checkbox"/>	Political Donations <input type="checkbox"/>
Accounting Fees <input type="checkbox"/>	Monthly Transit Passes <input type="checkbox"/>
Interest Paid on Non-Registered Investments <input type="checkbox"/>	First-time Home Buyer <input type="checkbox"/>
Investment Counsel Fees <input type="checkbox"/>	Other: <input type="checkbox"/>
Tuition Fees (T2202A – Signed by Student) <input type="checkbox"/>	Other: <input type="checkbox"/>

**OTHER IMPORTANT DOCUMENTS CHECKLIST**

Notice of (Re)Assessment for Prior Year(s) <input type="checkbox"/>	Sale of Shares/Investments Summary <input type="checkbox"/>
Mutual Fund Investment Summary Statement <input type="checkbox"/>	Tax Shelters <input type="checkbox"/>
Sale of Property – Details <input type="checkbox"/>	T2200 Employer Authorization for Expenses <input type="checkbox"/>
Sale of Real Estate – Lawyer Stmt. of Adjustments <input type="checkbox"/>	T1135 Foreign Property over \$100,000 <input type="checkbox"/>

**OTHER INFORMATION CHECKLIST (please provide if necessary)**

Employment/Commission Expenses <input type="checkbox"/>	Spouse's Net Income <input type="checkbox"/>
Automobile Expenses (If Eligible) <input type="checkbox"/>	Signed T1 Engagement Letter <input type="checkbox"/>
Alimony/Maintenance Paid or Received <input type="checkbox"/>	Direct Deposit information (Blank cheque) <input type="checkbox"/>
Dependent's Income <input type="checkbox"/>	Rental Income and Expenses: <input type="checkbox"/>
Foreign Income and Foreign Taxes Paid <input type="checkbox"/>	Self-Employment Income and Expenses: <input type="checkbox"/>
List of Foreign Property Owned <input type="checkbox"/>	Other: <input type="checkbox"/>
Income Tax Instalments Paid <input type="checkbox"/>	Other: <input type="checkbox"/>