

## PERSONAL INCOME TAX CHECKLIST

Name(s): \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Other: \_\_\_\_\_

Email: \_\_\_\_\_ Preferred Method of Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Spouse's birthdate (if applicable): \_\_\_\_\_

Marital Status: \_\_\_\_\_ If changed during year, date of change: \_\_\_\_\_

If you need your return completed before the filing deadline, please provide us with the required date: \_\_\_\_\_

	Name: _____		Name: _____	
Do you have dependent children? (If yes, please provide name(s), birthdate(s) and SIN(s) and income)	yes	no	yes	no
Do you pay for childcare? (If yes, we require a receipt with name, SIN and/or organization name)	yes	no	yes	no
If separated or divorced, do the children reside with you? (What % of the time? _____)	yes	no	yes	no
Did you pay any legal fees related to spousal or child support?	yes	no	yes	no
Do you have any income that you will not receive a slip for? (for example, rental, foreign pension, etc) (If yes, provide details below)	yes	no	yes	no
Do you receive the Universal Childcare Benefit? (You should have a slip RC62)	yes	no	yes	no
Do you receive/pay spousal support? (If yes, provide full name, SIN and amount received/paid)	yes	no	yes	no
Did you sell any property, shares, etc. (If yes, provide cost base & proceeds or realized gains/losses report from your financial institution)	yes	no	yes	no
Did you purchase any RRSP's?	yes	no	yes	no
Did you ever use RRSP's to purchase a home or go to school?	yes	no	yes	no
Do you have union or professional dues?	yes	no	yes	no
Did you move over 40km for employment purposes?	yes	no	yes	no
Do you have any expenses associated with investments (interest, management fees, accounting, SDB)	yes	no	yes	no
Do you have any expenses related to your employment? (please provide a T2200 signed by employer)	yes	no	yes	no
Do you pay for public transit on a monthly basis for yourself, spouse or children?	yes	no	yes	no
Do you pay for any children's activities that would qualify for the fitness or art's credit amount?	yes	no	yes	no
Did you pay for any tuition fees for yourself or a child?	yes	no	yes	no
Did you pay any student loan interest?	yes	no	yes	no
Do you have medical expenses? (include glasses, prescriptions, trips to Vancouver, Travel Insurance, etc)	yes	no	yes	no
Do you or anyone in your immediate family have a disability? (child, parent, grandparent)	yes	no	yes	no
Did you make any donations this year?	yes	no	yes	no
Did you make any income tax instalments this year?	yes	no	yes	no
Did you purchase a home during the year?	yes	no	yes	no
Did you have a change in your principal residence this year?	yes	no	yes	no
Are you a Canadian Citizen?	yes	no	yes	no
If yes, do you consent for CRA to release your name, address and birthdate to Elections Canada?	yes	no	yes	no
Do you have foreign assets in excess of \$100,000?" (This includes US investments in Canadian accounts)	yes	no	yes	no
If you are a US citizen, do you want us to file a US Form 1040?	yes	no	yes	no

\*Please provide all slips received (T4, T4A, T3, T5, T4E, T4RSP, T5013, T101, T4A(P), T4A(OAS), RC62, T4RIF)

**Notes:** (Please provide any additional information you feel is pertinent to your tax return) \_\_\_\_\_

**Self-employed individuals only:**

If you are a contractor, do you want us to file T5018 - summary of subcontractors?	yes	no	yes	no
If you are registered for GST/HST, do you want us to prepare your GST/HST return? (Please provide us with your GST/HST return)	yes	no	yes	no
If you are providing your own revenue/expense numbers - do they include GST/HST?	yes	no	yes	no
Are you using the same vehicle for business as you used last year? (if no, provide details)	yes	no	yes	no
What % of the time do you use your vehicle for business?	_____	_____	_____	_____
Did you purchase or dispose of any assets during the year?	yes	no	yes	no