

PERSONAL INCOME TAX RETURN CHECKLIST

Please consider all of the items on this checklist and provide full details of all income and deductions/credits. This will allow me to complete your return accurately and assist you when gathering your information.

Name: _____ Spouse/Partner Name: _____
 Telephone: Home _____ Work _____ Cell _____

If any of the following information has changed (or if you are a new client) please provide the following:

Address: _____

Self: SIN: _____ Birthdate: _____

Spouse/Partner: SIN: _____ Birthdate: _____ Net Income: _____
 (if I'm not completing spouse's return)

Marital Status: Married Widowed Divorced Single Separated Common-law

Children: Name Relationship Birthdate Net Income Disabilities Child Care

Are you a Canadian citizen?	Yes	No
Do you authorize Canada Revenue Agency (CRA) to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?	Yes	No
Did you dispose of your principal residence? Although non-taxable, it must be reported to CRA. Provide details of property disposed of: sale price, address, year acquired	Yes	No
Did you own/hold foreign property any time in the year with a total cost more than C\$100,000?	Yes	No
<i>If I am doing tax returns for other family members - are above responses the same?</i>	Yes	No

INCOME			IF YES PLEASE PROVIDE:
Salary/employment income	Yes	No	T4 slips
Pension/annuity income	Yes	No	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	Yes	No	Country, type (company/government), currency
RRIF/RRSP income	Yes	No	T4RIF / T4RSP slips
Interest/dividend/investment income	Yes	No	T5 / T5013 slips, details of other investment income
Trust/mutual fund income	Yes	No	T3 slips - plus see 'Capital gains/losses' below
Self-employment income (ie rental, business)	Yes	No	Details of income and expenses for period HST remittance returns for period
Alimony/taxable child support	Yes	No	Provide details
Capital gains/losses from sale of stocks, mutual funds, real estate, etc (non-registered only - do NOT provide if inside RRSP, RRIF. Usually 'moving' between funds is a sale)	Yes	No	1. Trading Summary for each brokerage account 2. Realized Gain/Loss Report 3. Monthly/quarterly statements showing transactions for January 1 to December 31. Or provide cost and date of purchase, sale proceeds and date of sale.
Other income	Yes	No	Details/slips (WSIB, executor fees, EI, social assistance)

DEDUCTIONS AND CREDITS			IF YES PLEASE PROVIDE:
RRSP contributions	Yes	No	Tax receipts - may include first 60 days of current year
-repay any Home Buyers Plan (HBP) or Lifelong Learning Plan (LLP)?	Yes	No	Amount of any HBP or LLP repayment and statement from CRA
Union or professional dues	Yes	No	Tax receipts (if not listed on T4)
Child care/summer camp for you to work or attend school	Yes	No	Details (name, SIN, amount paid)
First-time home buyer tax credit	Yes	No	Details
Moving expenses	Yes	No	Details - must be to move at least 40km closer to work
Alimony or deductible child support pursuant to written agreement or court order	Yes	No	Date of agreement _____ Alimony \$ _____ Deductible child support \$ _____ To whom? Require name, address, SIN
Investment income expenses	Yes	No	Details (interest expense, advisor fees, etc.)
Employment expenses	Yes	No	Details of non-reimbursed expenses
-employer registered for HST?	Yes	No	Completed by employer: T2200 or TL2 (transport)
Eligible Educator School Supply Credit	Yes	No	Teacher/ECE: employer signed form
Disability tax credit for self	Yes	No	T2201 completed by appropriate health care provider
Support any relatives?	Yes	No	Details (relationship, birthdate, net income, etc.)
Student loan interest	Yes	No	Tax receipts
Tuition fees for self	Yes	No	T2202/T2202A
Tuition fees of dependent which student wishes to transfer	Yes	No	T2202/T2202A signed by student Copy of student's tax return, student must claim some/all of credit if income sufficient
Vol. Firefighter/Search & Rescue	Yes	No	Details (must be 200 + hours in year)
Home Accessibility Tax Credit	Yes	No	Receipts for renovations to increase safety/functionality of individual aged 65+ or with Disability Tax Credit
Medical expenses not reimbursed (usually must exceed \$2302 or 3% of net income if less)	Yes	No	Receipts for medical expenses and reimbursements. Please provide total also.
Charitable donations	Yes	No	Tax receipts
Political contributions	Yes	No	Tax receipts
Property taxes/rent paid	Yes	No	Amount paid, municipality/landlord, address
Tax instalments paid (excluding amounts listed on tax slips)	Yes	No	Receipts and/or latest statement of account from CRA

OTHER			IF YES PLEASE PROVIDE:
More tax information to come?	Yes	No	Details
New bank account information	Yes	No	Void cheque

Please provide your prior year Notice of Assessment (and your prior tax return if you are a new client)

As the information in this checklist does not address all income tax matters and is abbreviated for simplicity, please contact me at 905.862.4166 for further information, details or clarification. Thank you.



Lisa Ritchie
CHARTERED PROFESSIONAL ACCOUNTANT