



PERSONAL INCOME TAX CHECKLIST

Personal Information:

Name: _____

Address: _____

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
- 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 No)
- 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 Benefits

Check if Slip is Attached

All Official Receipts:

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

Continued Next Page



PERSONAL INCOME TAX CHECKLIST--PAGE 2

Other Items:

- Listing of Self-Employment Income and Expense--Include GST 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
- Receipts for Child Fitness Credit
- 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