



**PERSONAL INCOME TAX CHECKLIST**

YEAR: \_\_\_\_\_ SOCIAL INSURANCE NO. \_\_\_\_\_

NAME: \_\_\_\_\_ BIRTHDATE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ (Number, Street, PO Box)

CITY: \_\_\_\_\_ PROV. \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

EMAIL: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

MARITAL STATUS : \_\_\_\_\_ (married, single, separated, divorced)

DATE OF MARITAL STATUS CHANGE: \_\_\_\_\_

SPOUSE'S NAME: \_\_\_\_\_ SOCIAL INSURANCE NO. \_\_\_\_\_

SPOUSE'S BIRTHDATE: \_\_\_\_\_

**CHANGES IN DEPENDENTS:**

Name	Date of Birth	SIN	Relationship	Income	Info is enclosed

**BUSINESS AND PROPERTY INCOME:**

Started a new business \_\_\_\_\_ Ceased operating a business \_\_\_\_\_

Have attached my business returns for you to complete: GST \_\_\_\_\_

Have enclosed details of rental property income \_\_\_\_\_ No changes in properties owned \_\_\_\_\_

**Income and deductions:** (please indicate what slips and other documents are enclosed, where appropriate, please provide slips)

**Income:**

**Deductions/Credits:**

- |   |  |
|---|--|
| <input type="checkbox"/> Notice of Assessment (Prior Year)  | <input type="checkbox"/> RRSP Contributions                      |
| <input type="checkbox"/> T4 Slips from employers            | <input type="checkbox"/> RRSP Home Buyers Loan Payments          |
| <input type="checkbox"/> T4PS Benefit slips                 | <input type="checkbox"/> T2200 Conditions of Employment          |
| <input type="checkbox"/> T3 Slips Investments, Mutual Funds | <input type="checkbox"/> Listing of/receipts employment expenses |
| <input type="checkbox"/> T5 Slips Banks, Dividends          | <input type="checkbox"/> Union dues receipts                     |
| <input type="checkbox"/> T4A(P) Canada Pension Plan         | <input type="checkbox"/> Moving Expenses                         |
| <input type="checkbox"/> T4A (OAS) Old Age Security         | <input type="checkbox"/> Child Care expense                      |
| <input type="checkbox"/> T4A Other income, other Pensions   | <input type="checkbox"/> Interest expense                        |
| <input type="checkbox"/> T4RSP RRSP income                  | <input type="checkbox"/> Accounting fees                         |
| <input type="checkbox"/> T4E EI Benefits                    | <input type="checkbox"/> Medical receipts                        |
| <input type="checkbox"/> T5007 WCB or Social Assistance     | <input type="checkbox"/> Donation receipts                       |
| <input type="checkbox"/> T5013 Partnership income           | <input type="checkbox"/> Political receipts                      |
| <input type="checkbox"/> T5508 Sale of securities           | <input type="checkbox"/> Tuition receipts                        |
| <input type="checkbox"/> T5018 Income as subcontractor      | <input type="checkbox"/> Student Loan interest                   |
| <input type="checkbox"/> Foreign income records             | <input type="checkbox"/> Tax instalments paid                    |
| <input type="checkbox"/> Investment statements              | <input type="checkbox"/> Children's fitness and art expenses     |

Did you own foreign property with a value in excess of \$100,000 Canadian? Yes \_\_\_\_\_ No \_\_\_\_\_

Did you sell your principal residence during the tax year? Yes \_\_\_\_\_ No \_\_\_\_\_