

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:

- ___ Notice of Assessment (Prior Year)
- ___ T4 Slips from employers
- ___ T4PS Benefit slips
- ___ T3 Slips Investments, Mutual Funds
- ___ T5 Slips Banks, Dividends
- ___ T4A(P) Canada Pension Plan
- ___ T4A (OAS) Old Age Security
- ___ T4A Other income, other Pensions
- ___ T4RSP RRSP income
- ___ T4E EI Benefits
- ___ T5007 WCB or Social Assistance
- ___ T5013 Partnership income
- ___ T5508 Sale of securities
- ___ T5018 Income as subcontractor
- ___ Foreign income records
- ___ Investment statements

Deductions/Credits:

- ___ RRSP Contributions
- ___ RRSP Home Buyers Loan Payments
- ___ T2200 Conditions of Employment
- ___ Listing of/receipts employment expenses
- ___ Union dues receipts
- ___ Moving Expenses
- ___ Child Care expense
- ___ Interest expense
- ___ Accounting fees
- ___ Medical receipts
- ___ Donation receipts
- ___ Political receipts
- ___ Tuition receipts
- ___ Student Loan interest
- ___ Tax instalments paid
- ___ 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 _____