

Personal Tax Information Checklist

Name: _____

Please and submit applicable slips

Income

- T4 for employment income and commissions
- T4A (OAS) old age pension, T4A (P) Canada pension
- T4A for other income
- T5, T600, TBD slips for investment income
- T5018 Statement of Contract Payments (for amounts received)
- T3 slips for income from a Trust or mutual fund
- T4E slips for Employment Insurance benefits
- RC62 Universal Child Care benefits
- T5007 for Worker's Compensation receipts
- T4RSP, T4RIF, completed T3012A slips for withdrawals from an RRSP or RRIF
- Details of stock options exercised during year, including the fair market value of the stock when exercised, the amount paid by you and the date of exercise. If you elected to defer the employment income benefit, we need a copy of the letter provided to your employer.
- Details relating to dispositions of capital property (shares, bonds, real estate, etc.) during year and provide related documents if applicable.
- Details of property addresses, income and expenses for rental properties
- If you are engaged in a self-employed business, please provide summary of revenue and expenses for year. (See website for business schedule.)
- If you are a member of a partnership investment, please submit the financial statements or the T5013 information slip for current year ends.
- Details of alimony, maintenance or child support received (Please indicate if child support is received pursuant to an agreement made or varied after April 30, 1998.)
- Details of foreign income and foreign taxes paid
- Details of other interest bearing investments, such as principal, date of issue, interest rate and interest received during the year, income reporting method for each (cash, accrual, three-year accrual)
- Form T1198 - Statement of Qualifying Retroactive Lump-Sum payments

Deductions/Credits

- RRSP contribution receipts, excluding Home Buyer's Plan repayments and details of any pension adjustment reversals
- Receipts for tuition fees for yourself, spouse and dependents - Tuition fees must exceed \$ 100 per institution
- Number of months you or your dependents were in full-time attendance at university. Note: Form T2202, Education Deduction Certificate, must be signed by the university and the student and filed with your return.
- Adoption Expenses
- Interest paid on investment loans. Please indicate the investment(s) purchased with the borrowed funds.
- Amount of alimony or maintenance payments that are made pursuant to a court order or a written agreement. Please indicate the name and address of the recipient.
- Amount of child support paid in the year pursuant to an agreement made or varied after April 30, 1998
- If you are an employee and entitled to deduct employment expenses, Form T2200
- Declaration of Employment Conditions - Office and Employment Expenses must be signed by your employer and filed with your return. Also please provide details of your employment expenses including tradesperson and apprentice tools and complete the attached Motor Vehicle Worksheet (See website), if applicable.
- Child care expense receipts which include the name, address and S.I.N. of the caregiver and amounts attributable to each child.
- Medical and dental bills for yourself, spouse and dependents

- Charitable donation receipts
- Deductions transferred from spouse. (Note: If your spouse is not filing a return, please enclose all of his or her information slips. If your spouse is filing a return, and we do not prepare it, please give us the details of income and deductions.)
- Political donation receipts
- Receipts for professional or union dues paid
- T5006 slip or official provincial slip for investments in Labour Sponsored Venture
- Capital Corporations or Labour Sponsored Investment Funds
- The cost of public transit passes purchased
- For children 17 or under, please provide their SIN and date of birth. If the child does not have a SIN number, please provide a copy of his or her birth certificate
- Receipts for Children's Fitness /Art's tax credit for dependants under age 17 at end of year
- If you are a first time home buyer in, please provide information relating to purchase. Specifically, the date, amount and name of person(s) that the home is registered to.

Other:

- If you made income tax installments during the year, please provide us with the balance in your account.
- If we have not prepared your return in the past, please provide us with a copy of your prior year return
- Address changed since last year? Yes () No (). If yes, please provide new address.
- Do you wish to split family income (if applicable) to reduce combined income tax? Yes () No ()
- Please provide us with your spouse's current year net income (unless we prepare his/her return) and the names and birth dates of your children.
- Please provide a copy of your prior year notice of assessment.
- Please provide a copy of your statement of current year required repayment from CRA under the Home Buyer's Plan and the amount of repayment actually made.

Foreign Property Reporting

Did you own or hold foreign property at any time during the year with a total cost of more than CAD \$100,000? If yes, please provide details. You will be required to file Form T1135.

Yes () No ()