

## Lohn Caulder One-Page Personal Income Tax Checklist

Full name: \_\_\_\_\_  
 S.I.N. \_\_\_\_\_  
 Birthdate \_\_\_\_\_  
 Marital status: \_\_\_\_\_  
 Citizenship \_\_\_\_\_  
 Mailing address: \_\_\_\_\_  
 \_\_\_\_\_  
 Phone - home \_\_\_\_\_  
 Phone - cell \_\_\_\_\_  
 Phone - business/daytime \_\_\_\_\_  
 Email \_\_\_\_\_  
 Fax \_\_\_\_\_  
 Any family members disabled? \_\_\_\_\_  
 Northern Residents deduction? \_\_\_\_\_

Spouse \_\_\_\_\_  
 Spouse S.I.N. \_\_\_\_\_  
 Spouse citizenship \_\_\_\_\_  
 Child 1 name: \_\_\_\_\_  
 Child 1 birthdate \_\_\_\_\_  
 Child 1 S.I.N. \_\_\_\_\_  
 Post-secondary? Attach T2202 \_\_\_\_\_  
 Sports/recreations amts: \_\_\_\_\_  
 Child 2 name: \_\_\_\_\_  
 Child 2 birthdate: \_\_\_\_\_  
 Child 2 S.I.N. \_\_\_\_\_  
 Post-secondary? Attach T2202 \_\_\_\_\_  
 Sports/recreations amts: \_\_\_\_\_  
 New children this year? \_\_\_\_\_  
 Prior year's T1 (new clients) \_\_\_\_\_

### Various income sources:

Employment T4 or T4A slips   
 Pension (T4/T4OAS/T4AP)   
 Employment insurance   
 Interest/dividends/capital gains T5/T5013   
 Other investments T5013/T5008   
 RRSP, DPSP, RPP, RRIF   
 Estates/Trusts/Mutual Fund T3   
 Universal Child Care Benefit RC62   
 Other \_\_\_\_\_

### Official receipts for tax deductions:

RRSP contribution   
 Union/professional dues   
 Child care expenses (incl name, SIN of recipient)   
 Child sport/recreational expenses   
 Moving expenses   
 Accounting fees   
 Interest paid on non-registered investments   
 Investment counsellor fees   
 Tuition fees (T2202/signed by student)   
 Student loan interest statement   
 Medical expenses   
 Disability certificate (T2201)   
 Charitable donations (indicate if gift 'in-kind')   
 Political donations   
 Monthly transit passes   
 Safety deposit box rental fees   
 First home purchased this year ?

### Various important documents:

Notice of (re)assessment for prior year(s)   
 Mutual fund investment summary statement   
 Sale of property - details   
 Sale of real estate - lawyer's stmt of adjustments   
 Sale of shares/investments summary   
 Tax shelters   
 Home buyer plan (RRSP) transactions   
 T2200 employer authorization for expenses   
 Other \_\_\_\_\_

### Provide details of:

Commission expenses   
 Automobile expenses, if eligible   
 Alimony/maintenance paid or received   
 Capital gains elections of prior years (T664)   
 Dependent's income   
 Foreign income and foreign taxes paid   
 List of foreign property owned   
 Income tax instalments paid   
 Rental income and expenses   
 Self employment income and expense   
 Spouse's income   
 Signed T1 engagement letter   
 Electronic filing? (whole family will be presumed)   
 Other: \_\_\_\_\_   
 Other: \_\_\_\_\_   
 Other: \_\_\_\_\_   
 Other: \_\_\_\_\_