

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 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
 Expenses for Home Renovation Tax Credit?
 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: _____