

Personal Tax Checklist

PERSONAL INFORMATION			
Full Name		S.I.N.	Birthdate
Apt./Suite – Building Number Street Name, City, Postal Code			Marital Status
Phone	Cell	Fax	Email
Any family members disabled? YES <input type="checkbox"/> NO <input type="checkbox"/>		Are you a Northern Resident? YES <input type="checkbox"/> NO <input type="checkbox"/>	
SPOUSE INFORMATION			
Full Name		S.I.N.	Birthdate
Citizenship			
CHILDREN INFORMATION			
Full Name – Child 1		S.I.N.	Birthdate
Citizenship			
Attending Post-Secondary Education? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			Amounts for fitness/arts:
Full Name – Child 2		S.I.N.	Birthdate
Citizenship			
Attending Post-Secondary Education? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			Amounts for fitness/arts:
Full Name – Child 3		S.I.N.	Birthdate
Citizenship			
Attending Post-Secondary Education? YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>If yes please attach T2202A</i>			Amounts for fitness/arts:
INCOME SOURCES CHECKLIST			
Employment T4 or T4A slips	<input type="checkbox"/>	RRSP, DPSP, RPP, RRIF	<input type="checkbox"/>
Pension (T4/T4OAS/T4AP)	<input type="checkbox"/>	Estates/Trusts/Mutual Fund T3	<input type="checkbox"/>
Employment Insurance	<input type="checkbox"/>	Universal Child Care Benefit RC62	<input type="checkbox"/>
Interest/Dividends/Capital Gains T5/T5013	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Other Investments T5013/T5008	<input type="checkbox"/>	Other:	<input type="checkbox"/>
TAX DEDUCTIONS CHECKLIST (with official receipts)			
RRSP Contribution	<input type="checkbox"/>	Student Loan Interest Statement	<input type="checkbox"/>
Union/Professional Dues	<input type="checkbox"/>	Medical Expenses	<input type="checkbox"/>
Child Care Expenses (Incl. Name & SIN of Recipient)	<input type="checkbox"/>	Disability Certificate (T2201)	<input type="checkbox"/>
Child Fitness/Arts Expenses	<input type="checkbox"/>	Charitable Donation (Indicate if Gift "In-Kind")	<input type="checkbox"/>
Moving Expenses	<input type="checkbox"/>	Political Donations	<input type="checkbox"/>
Accounting Fees	<input type="checkbox"/>	Monthly Transit Passes	<input type="checkbox"/>
Interest Paid on Non-Registered Investments	<input type="checkbox"/>	First-time Home Buyer	<input type="checkbox"/>
Investment Counsel Fees	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Tuition Fees (T2202A – Signed by Student)	<input type="checkbox"/>	Other:	<input type="checkbox"/>
OTHER IMPORTANT DOCUMENTS CHECKLIST			
Notice of (Re)Assessment for Prior Year(s)	<input type="checkbox"/>	Tax Shelters	<input type="checkbox"/>
Mutual Fund Investment Summary Statement	<input type="checkbox"/>	T2200 Employer Authorization for Expenses	<input type="checkbox"/>
Sale of Property – Details	<input type="checkbox"/>	T1135 Foreign Property over \$100,000	<input type="checkbox"/>
Sale of Real Estate – Lawyer Stmt. of Adjustments	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Sale of Shares/Investments Summary	<input type="checkbox"/>	Other:	<input type="checkbox"/>

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OTHER INFORMATION CHECKLIST (please provide if necessary)			
Employment/Commission Expenses	<input type="checkbox"/>	Spouse's Net Income	<input type="checkbox"/>
Automobile Expenses (If Eligible)	<input type="checkbox"/>	Signed T1 Engagement Letter	<input type="checkbox"/>
Alimony/Maintenance Paid or Received	<input type="checkbox"/>	Direct Deposit information (Blank cheque)	<input type="checkbox"/>
Dependent's Income	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Foreign Income and Foreign Taxes Paid	<input type="checkbox"/>	Other:	<input type="checkbox"/>
List of Foreign Property Owned	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Income Tax Instalments Paid	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Rental Income and Expenses	<input type="checkbox"/>	Other:	<input type="checkbox"/>
Self-Employment Income and Expenses	<input type="checkbox"/>	Other:	<input type="checkbox"/>