

PERSONAL INCOME TAX CHECKLIST



Taxation year: _____

PRIMARY CONTACT

NAME: _____ BIRTHDATE: ____/____/____ S.I.N.: ____/____/____
DD / MM / YY

ADDRESS: _____
Street City Province Postal code

Home: _____ Cell: _____ Email: _____

PREFERRED METHOD OF CONTACT: Email Cell Phone Home Phone
(please circle)

MARITAL STATUS: Single Married Common-law Widowed Divorced Separated
(please circle)

DIRECT DEPOSIT: ____/____/____
BRANCH FINANCIAL INST. ACCOUNT NUMBER

SPOUSE or COMMON-LAW PARTNER (if applicable)

NAME: _____ BIRTHDATE: ____/____/____ S.I.N.: ____/____/____
DD / MM / YY

Cell: _____ Email: _____

DIRECT DEPOSIT: ____/____/____
BRANCH FINANCIAL INST. ACCOUNT NUMBER

DEPENDENTS (if applicable)

NAMES OF DEPENDENTS:	BIRTHDATE:	S.I.N.:
_____	____/____/____ DD / MM / YY	____/____/____
_____	____/____/____ DD / MM / YY	____/____/____
_____	____/____/____ DD / MM / YY	____/____/____
_____	____/____/____ DD / MM / YY	____/____/____

PLEASE ANSWER THE FOLLOWING QUESTIONS:

Did you or your spouse/common-law partner sell your principal residence at any time during the year? YES / NO

Did you or any of your family members own foreign property at any time during the year with a total cost of more than CDN\$100,000? YES / NO

*This includes stocks in foreign companies (ie Apple, General Motors) held through your Canadian brokerage account and rental properties in the U.S. However, this does not include investments held in RRSP/RRIF accounts or personal use properties like vacation homes that are not rented out. If so, please provide information.

Would you and your family members like to authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Elections Canada to update the National Register of Electors? YES / NO

NEW CLIENTS: Please provide a copy of your last year's tax return and Notice of Assessment.

INCOME, DEDUCTIONS, AND TAX CREDITS

Please review the following Income and Deductions and Tax Credits lists to help you determine what documentation to provide our firm.
Please note this list is not all-inclusive.

INCOME

Employment and Business

	Documentation Required
Salaries, Commissions, and etc.	T4, T4A Slips
E.I. Benefits	T4E Slips
Workers Compensation Benefits	T5007
Self-Employment/Business/Professional Income	See Page 3

Families

Spousal Support Received	Details including separation agreement
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Seniors

RRSP and RRIF Income	T4RSP Slips and T4RIF slips
Pension Income (Including OAS/CPP)	T4P, T4OAS, and T4A Slips

Investment

Investment Income	T3, T5 Slips, brokers annual trading summary
* interest and dividend income	
Taxable Capital Gains and Losses	Details
* i.e. sales of stock or rental property	
Partnership Income	Details, T5013

Rental Income *including rent from a basement suite	See Page 4
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DEDUCTIONS AND TAX CREDITS

Individuals

	Documentation Required
Charitable and Political Donations	Official Receipts
Medical and Dental Expenses	Official Receipts *not covered by insurance provider
Disability Tax Credit (for permanent disabilities)	Letter from doctor in first year claimed
Moving Expenses	Details of Expenses (travel, meals, selling costs, etc.)
* must have moved 40 km closer to work/school	
Volunteer Firefighter/Search and Rescue	200 hours of eligible firefighting/search and rescue services during the year
Home Buyers' Amount	Advise of home purchase during the taxation year
*did not live in another home owned by you or your spouse/common-law partner in the preceding four years	
Home Accessibility Expenses	Receipts
(for seniors and persons eligible for the disability tax credit)	
Eligible Educator School Supply Tax Credit	Receipts for eligible supplies
Renter's Tax Credit	Name of Landlord, renting address, number of months rented, amount of rent paid

Employment

Employment Expenses	See Page 4
Union or Professional Dues	T4 Slip and/or Official Receipts
Tradesperson tools	Receipts

Families

Child Care Expenses	See Page 4
Spousal Support Paid	Name and Address of Payee
Infirm Dependent and/or Caregiver Credit	Supporting dependents 18 or older with impairment in mental or physical functions, is dependent on you for support, and is a parent, brother, sister, grandparent, aunt, uncle, niece, or nephew
Adoption expenses	Details of expenses including legal fees, agency fees, reasonable travel

Students and Apprentices

Tuition fees	Form T2202 (usually downloaded from school website)
Interest on Official Student Loans	Official Receipts
Interest on Canada Apprentice Loan	Official Receipt
Training Tax Credit (BC residents only)	ITA Transcript

Investors

Interest/Carry Charges	Details
Pension Plan/RRSP Contributions	T4 Slip, Official Receipts

CLIENT NAME: _____
 BUSINESS NAME: _____
 TAXATION YEAR: _____



SELF-EMPLOYMENT/BUSINESS/PROFESSIONAL INCOME AND EXPENSES

*If your company is GST registered please fill out the Net of GST column (excludes GST). If we are filing your GST return please fill out the GST column.

	Total	Net of GST*	GST*
REVENUE	_____	_____	_____
EXPENSES			
Accounting and legal fees	_____	_____	_____
Consulting	_____	_____	_____
Advertising and promotion	_____	_____	_____
Business taxes/licences/memberships	_____	_____	_____
Rent	_____	_____	_____
Insurance	_____	_____	_____
Interest and bank charges	_____	_____	_____
Repairs and maintenance	_____	_____	_____
Management/Administration	_____	_____	_____
Meals and entertainment	_____	_____	_____
Office supplies	_____	_____	_____
Salaries, wages, and benefits	_____	_____	_____
Travel (excluding automotive)	_____	_____	_____
Other: _____	_____	_____	_____
_____	_____	_____	_____

GOVERNMENT ASSISTANCE PROGRAMS

*examples include: Temporary Wage Subsidy (TWS), Canada Emergency Wage Subsidy (CEWS), Canada Emergency Rent Subsidy (CERS), Canada Emergency Business Account (CEBA), and etc.

Program name: _____ Amount Received: _____

AUTOMOTIVE EXPENSES

Make, model, year: _____	Cost of vehicle if acquired during the year: _____		
	Total	Net of GST*	GST*
Fuel	_____	_____	_____
Maintenance/Repairs	_____	_____	_____
Insurance/License/Registration	_____	_____	_____
Interest on car loan	_____	_____	_____
Leasing Cost	_____	_____	_____
Kilometers driven for business/employment purposes	_____	_____ km	} required
Total Kilometers driven for the year	_____	_____ km	

➡ Please note the CRA considers driving between your home and work location as personal use.

HOME OFFICE EXPENSES

	Total	Net of GST*	GST*
Rent	_____	_____	_____
Mortgage interest	_____	_____	_____
Heat	_____	_____	_____
Hydro	_____	_____	_____
Water	_____	_____	_____
Repairs/Maintenance	_____	_____	_____
Insurance	_____	_____	_____
Property Taxes	_____	_____	_____
Strata fees	_____	_____	_____
Other: _____	_____	_____	_____
Square Footage of Home Office	_____	Square Footage of Home	_____

CLIENT NAME: _____
TAXATION YEAR: _____



EMPLOYMENT EXPENSES

*Please have your employer fill out and sign Form T2200 as applicable

Accounting/legal fees	_____
Advertising/Promotion	_____
Meals/Entertainment	_____
Lodging	_____
Parking	_____
Supplies/Postage/Stationary	_____
Telephone	_____
Other:	_____
Other:	_____
Other:	_____

Automotive expenses

Please fill out Automotive Expenses Schedule on page 3.

(do not fill out the Net of GST and GST columns)

Home office expenses

Detailed Method: Please fill out Home Office Expenses Schedule on page 3.

(do not fill out the Net of GST and GST columns)

RENTAL INCOME

Address of rental property _____

Gross Rent _____

Expenses

Property Taxes	_____
Maintenance/Repairs	_____
Mortgage interest	_____
Insurance	_____
Light/Heat/Water	_____
Advertising	_____
Other:	_____
Other:	_____
Other:	_____

BASEMENT SUITES (if applicable)

Square footage of suite _____

Square footage of house _____

CO-OWNER (if applicable)

Name _____

S.I.N. _____

% of ownership _____

CHILD CARE EXPENSES

PAID TO:	Amount	_____
	Name	_____
	Address	_____

S.I.N. (if applicable) _____ / _____ / _____

OTHER INFORMATION

Please enclose any other information required to complete your personal tax return.