



Personal Income Tax Return Checklist

This checklist form is interactive.

Please note: the information you enter in the form can be saved on your computer or printed on your printer. To save it do the following:

- **On a Windows PC, hold the CTRL key down and hit the S key**
- **On a MAC, hold the Command key down and hit the S key**
- **Choose your Desktop of any familiar location to save the file**
- **Click "Save"**

YOU CAN ADD CONTENT, SAVE IT, CLOSE IT, REOPEN IT AND ADD MORE INFORMATION THEN.

PRINT THE DOCUMENT ONCE YOU HAVE FINISHED FILLING IT IN AND BRING IT TO OUR OFFICE WITH YOUR TAX SLIPS.

Please review and complete the entire document prior to giving us your personal tax information for the year.

Is this the first year we have prepared your income tax return?

Yes

If yes, please provide us with a copy of your prior year's return and notice of assessment or reassessment.

No

If no, please provide us with your prior year notice of assessment or reassessment

Personal Information



1. Name: _____
2. SIN #: _____
3. Birthdate: _____
4. Address: _____
5. Home Phone: _____
6. Work Phone: _____
7. Cell Phone: _____
8. Email: _____
9. Marital Status December 31: _____
10. Date of Change in Marital Status During Year?: _____
11. Province of Residence December 31: _____
12. Date of Change in Canadian Residency: _____
13. Change in Name? _____
14. Date of Death if Deceased: _____
15. Financial Advisor's Contact Information: _____
16. Did you sell your Principal Residence within this tax year? YES
 - a. Address _____
 - b. Year of acquisition _____
 - c. Proceeds of disposition _____



Filing Information

1. Authorization to Represent Client? _____
2. Citizenship: _____
3. Provide Information to Elections Canada? _____
4. Foreign Property (including portfolio securities) with Cost Greater than
 - a. \$100,000? _____
5. Direct Deposit of Refund? (please attach voided cheque) _____

Spousal Information

1. Name: _____
2. SIN #: _____
3. Birthdate: _____
4. Address: _____
5. Home Phone: _____
6. Work Phone: _____
7. Email: _____
8. Preparing Return for Spouse? _____
9. Spousal Net Income if we are not Preparing T1: _____

Dependent Information #1



1. Name: _____
2. SIN: _____
3. Relationship: _____
4. Date of Birth: _____
5. Net Income: _____
6. Qualify for Disability? _____
7. Fitness / Arts Expenses? _____
8. Tuition? _____
9. Childcare Expenses? _____

Dependent Information #2



1. Name: _____
2. SIN: _____
3. Relationship: _____
4. Date of Birth: _____
5. Net Income: _____
6. Qualify for Disability? _____
7. Fitness / Arts Expenses? _____
8. Tuition? _____
9. Childcare Expenses? _____

Dependent Information #3



1. Name: _____
2. SIN: _____
3. Relationship: _____
4. Date of Birth: _____
5. Net Income: _____
6. Qualify for Disability? _____
7. Fitness / Arts Expenses? _____
8. Tuition? _____
9. Childcare Expenses? _____

Sources of Income



1	Employment Income	T4
2	Profit sharing	T4PS
3	Old Age Security	T4OAS
4	Canada Pension Plan	T4AP
5	Other Pensions/RRIFs/Annuities	T4A
6	Universal Child Care Benefit	RC 62
7	Employment Insurance	T4E
8	Interest and Dividends	T5/T3
9	Partnership Income	T5013
10	RRSP Withdrawals	T4RSP
11	Workers Compensation	T5007
12	Social Assistance	T5007
13	Other	see below
14	Rental Income	see below
15	Self Employed	see below
16	Sales of property and investments	see below

Deductions from Income



1. Did you make RRSP contributions during the year or in the first sixty days of the following year?(RRSP contribution slip mandatory) _____
2. Are you a participant in the Home Buyers Plan or Life Long Learning Plan? ____
3. Do you agree to split pension income with your spouse? _____
4. Did you make Union or Professional dues during the year? _____
5. Did you or your spouse pay for childcare expenses? _____
6. Did you dispose of either shares or debt in a Canadian Controlled Private
7. Corporation during the year? _____
8. Did you make or receive spousal or child support payments? _____
9. Name and SIN of former spouse: _____
10. Did you incur costs including interest to earn investment income? _____

11. Did you incur moving costs to be at least 40 km closer to new employment or to start a new business? _____
12. Did you incur un-reimbursed expenses in the course of your employment? _____
13. Do you have a signed T2200 from your employer? _____
14. Did you incur legal expenses to obtain or enforce a right to wages, pension or support from a former spouse? _____
15. Did you repay any social benefits to the government? _____

Tax Credits



1. Did you incur costs for adoption? _____
2. Did you care for dependent other than a child? _____
3. Are you disabled? _____
4. If yes above, do you have a signed T2201? _____
5. Did you pay interest on student loans? _____
6. Did you pay tuition to a post-secondary institution? _____
7. Did you pay premiums to health insurance plan? _____
8. Did you pay for medical expenses for yourself or dependent? _____
9. Did you make any charitable contributions? _____
10. Did you make and political contributions? _____
11. Did you pay any tax via installments? _____

Rental Property Income and Expenses



1. Address: _____
 2. Joint Owner? (name and SIN) _____
 3. Rental income: _____
- Expenses
1. Advertising: _____
 2. Bank Charges: _____
 3. Insurance: _____
 4. Interest: _____

5. Maintenance and Repairs: _____
6. 6. Motor Vehicle^(see below): _____
7. Office expenses: _____
8. Professional fees: _____
9. Property taxes: _____
10. Utilities: _____
11. Other: _____

Capital Dispositions/Expenditures

1. The purchase price of rental property: _____
2. Percentage Split Between Land and Building: _____
3. Major renovations and purchases: _____
4. Proceeds of disposition: _____
5. Costs of disposition: _____

Self-employed Income



1. Address: _____
2. Joint Owner (name and SIN): _____
3. Registered for GST? _____
4. If yes to #3, Do items below include GST in totals? _____
5. Business Income: _____

Expenses

1. Purchases of product/raw material: _____
2. Advertising and promotion: _____
3. Bad debts: _____
4. Business taxes: _____
5. Delivery, freight, and postage: _____
6. Fuel (other than vehicle): _____
7. Insurance: _____
8. Interest and bank charges: _____
9. Maintenance and repairs: _____
10. Management and Administration: _____
11. Meals and entertainment: _____
12. Motor vehicle (see below): _____
13. Office expenses: _____
14. Professional fees: _____
15. Property Taxes: _____
16. Rent: _____
17. Salaries and wages: _____
18. Travel: _____
19. Telecommunication: _____
20. Private health plan: _____
21. Other: _____
22. Office in Home (see below): _____
23. Capital expenditures: _____

Automobile Expenses for Rental/Self-employed/Employment expenses



1. Year and make of car: _____
2. Date purchased/leased(please provide documentation): _____
3. Total km driven during the year: _____
4. Total km driven to earn income: _____
5. Fuel costs: _____
6. Interest on vehicle loan: _____
7. Insurance: _____
8. License fees: _____
9. Maintenance and repairs: _____
10. Lease down payment: _____
11. Annual lease costs: _____
12. Parking: _____
13. Tolls: _____

Office in the home for self-employed



1. Area of the home used for business: _____
2. The total area of home: _____
3. Utilities: _____
4. Insurance: _____
5. Mortgage interest: _____
6. Property taxes: _____
7. Minor repairs and maintenance: _____

Home Office Commission Employees



1. Area of the home used for business: _____
2. Total area of home: _____
3. Utilities: _____
4. Insurance: _____
5. Property taxes: _____
6. Minor repairs and maintenance: _____

Home Office Non-commissioned Employees



1. Area of the home used for business: _____
2. The total area of home: _____
3. Utilities: _____
4. Minor repairs and maintenance: _____

Capital Gains and Losses (please add additional worksheet for multiple dispositions)



1. Did you sell, transfer or gift any stocks, mutual funds, income trusts or real property during the year? _____
 2. Description: _____
 3. Proceeds of disposition: _____
 4. Costs of disposition: _____
 5. Date sold: _____
 6. Date(s) purchased: _____
 7. Costs of purchase: _____
 8. Have there been any reinvested earnings while holding investment? _____
 9. Have there been any returns of capital while holding investment? _____
 10. If property owned December 31, 1971, value on that day: _____
 11. If property owned February 24, 1994, did you claim the capital gains election available? _____
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Other Deductions from Employment Income



1. Food and beverage: _____
2. Lodging: _____
3. Parking: _____
4. Supplies: _____
5. Professional fees (commission only): _____
6. Advertising and promotion (commission only): _____
7. Entertainment (commission only): _____