

## PERSONAL INCOME TAX CHECKLIST

**PERSONAL INFORMATION:** *All clients please complete the following* TAX YEAR: \_\_\_\_\_

	YOU	SPOUSE
Name:		
Date of birth:		
Social insurance number:		
Marital status:		
Address:		
E-mail addresses:		
Phone numbers:	home: _____ work: _____ cell: _____	
	spouse work: _____ spouse cell: _____	
Dependents:	Please attach separately: Names, social insurance numbers, birth dates and net income of all dependents.	

### GENERAL INFORMATION:

- Are all individuals' Canadian citizens? **YES** ☐ **NO** ☐
- Who should we contact with questions about your tax information? \_\_\_\_\_
- Is there a date after which you will not be available to sign your return? \_\_\_\_\_
- Do you hold investments or investment real property outside Canada which has a value in excess of \$100,000 CDN (including Bitcoin)?  
**YES** ☐ **NO** ☐
- Did you buy or sell a real estate property in the tax year? **YES** ☐ **NO** ☐
- Is there a financial planner we can contact regarding your investments? Name \_\_\_\_\_  
Tel # \_\_\_\_\_

## DOCUMENTS TO BE PROVIDED

- Prior year notice of assessment/reassessment (if not already sent to us)
- Current year instalment summary
- **If new personal tax client, copy of prior year return, and carryforward details such as donations, losses, RRSP contributions, etc.**

## INCOME INFORMATION:

### EMPLOYMENT/OTHER INCOME

- Income slips (T4, T4A, T4AP, T4E, T4RSP, T4RIF, T4AOAS, T4PS, T3, T5, T5007, T5013, RC62) Stock option / benefit plan statements from employer
- Realized gain/loss report for all investments sold this year (You can request a copy from your financial advisor)

### RENTAL INCOME

- Full address, number of rental units
- Revenue and expenses, including mortgage interest, property tax, repairs, insurance, utilities, condo fees
- Percentage of personal use, if applicable
- Details of any capital improvements (e.g. renovations, roof replacement, appliance purchases)
- If bought or sold this year, provide purchase/sale agreement, statement of adjustments, reporting letter from lawyer and allocation of value between land and building

### SELF-EMPLOYMENT INCOME

- Revenue for the year (on an accrual basis)
- FIT or micro FIT renewable energy contract revenue and expenses including details of purchase and installation costs.
- HST returns, if applicable, for the year
- Confirm method of accounting for HST (regular or quick method)

## EXPENSES:

### SELF-EMPLOYMENT, EMPLOYMENT & COMMISSION

- T2200 - Conditions of Employment form signed by employer
- Meals and entertainment
- Travel, promotion, conferences, dues, telecommunications, supplies, etc.
- Automotive - kilometers used for business and total kilometers per year, operating expenses, lease costs, loan interest, purchase/sale price if bought/sold this year
- Office-in-home - percentage used for business, rent, mortgage interest, property taxes, condo fees, utilities, insurance

## DEDUCTIONS:

- ☐ RRSP receipts
- ☐ Child care, with supporting receipts and SIN of Care giver
- ☐ Adoption costs
- ☐ Union/membership dues
- ☐ Moving expenses (contact us for detailed list)
- ☐ Alimony/support payments, with copy of agreement if not previously provided
- ☐ Legal fees to collect salary, alimony, support
- ☐ Accounting fees, investment counselfees
- ☐ Investment/business interest expense
- ☐ Tax shelter deductions - tax slips and tax reporting package
- ☐ Trades people's tools

## TAX CREDITS:

- ☐ Charitable and political donation receipts
- ☐ Medical/dental/attendant care expenses with receipts
- ☐ Tuition fee receipt (T2202), with dependent's income and signatures
- ☐ Disability credit form (T2201) for self or dependents for first-time claims
- ☐ Student loan interest statement
- ☐ Names and birth dates for children under age 18
- ☐ For seniors or disabled individuals residing on their own, or with family members, receipts for home renovations to improve accessibility (to maximum of \$10,000)
- ☐ Receipts for monthly transit passes
- ☐ Indicate if eligible for first-time home buyers' credit for this year
- ☐ Indicate if family member (other than child) resides with you or is dependent on you
- ☐ Current year rent/property tax information if eligible for Ontario tax credits

*Please note: We are located in the Canon building at the corner of Walkley Road & St. Laurent Blvd.  
The office will be open from 8:00am-4:00pm Monday – Friday*

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