

# Income Tax Checklist

**Year:** \_\_\_\_\_

**Name** \_\_\_\_\_

**Address** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Email** \_\_\_\_\_

**Phone** \_\_\_\_\_

**SIN#** \_\_\_\_\_

**Birthdate** \_\_\_\_\_

## Details of all Family members (Spouse/Children)

Name	Relationship	SIN#	Birthdate	Living with you? Y/N

**Marital Status**

- Single
- Married
- Divorced
- Widowed
- Separated

If changed during year, date of change \_\_\_\_\_

### Foreign Property Reporting

Did you own Foreign Property costing more than \$100,000 during the year? Y/N \_\_\_\_\_

*If Yes you need to complete Form T1135 Foreign Income verification form - See us for details*

### US Citizenship

Are you an American Citizen? Y/N \_\_\_\_\_

*If yes, you should be aware that all US Citizens are required to file US tax returns regardless of where they live or whether they have any income or ties to the US.*

*There are very stiff penalties for not filing US tax returns if required.*

*If you are an American citizen and have not filed US tax returns, please let us know. We can advise you on the proper steps to take.*

## Tax Forms/Receipts Required

### CRA Information

\_\_\_\_\_ Copy of last year's Tax return  
\_\_\_\_\_ Notice of Assessment  
\_\_\_\_\_ Installments paid  
\_\_\_\_\_ CRA correspondence  
\_\_\_\_\_ RRSP Contribution Limit  
\_\_\_\_\_ RRSP homebuyers plan repayment  
\_\_\_\_\_ Other: (Specify) \_\_\_\_\_

### Income/Credit Slips

\_\_\_\_\_ T3 Mutual funds, Trust income  
\_\_\_\_\_ T4 Employment income  
\_\_\_\_\_ T4A Scholarships  
\_\_\_\_\_ T4A Other pensions & annuities  
\_\_\_\_\_ T4A(OAS) Old Age Security  
\_\_\_\_\_ T4A(P) CPP benefits  
\_\_\_\_\_ T4E EI benefits  
\_\_\_\_\_ T4RSP RRSP income  
\_\_\_\_\_ T4RIF RRIF income  
\_\_\_\_\_ T5 Investment income - interest, dividends  
\_\_\_\_\_ Capital Gains/Investment sales (Non-RRSP)  
\_\_\_\_\_ T5007 WCB or Social Assistance  
\_\_\_\_\_ T5013 Partnership income  
\_\_\_\_\_ RC62 UCCB benefits  
\_\_\_\_\_ Spousal support income (receipts or legal agreement)  
\_\_\_\_\_ Other: (Specify) \_\_\_\_\_  
\_\_\_\_\_ Other: (Specify) \_\_\_\_\_

### Deductions/Receipts

\_\_\_\_\_ RRSP contribution slips  
\_\_\_\_\_ Medical expenses  
\_\_\_\_\_ T2201 Disability Tax Credit certificate  
\_\_\_\_\_ Transit passes  
\_\_\_\_\_ Charitable donation receipts  
\_\_\_\_\_ Political donation receipts  
\_\_\_\_\_ Union dues  
\_\_\_\_\_ Interest paid on student loans  
\_\_\_\_\_ Interest on investment loans  
\_\_\_\_\_ Carrying charges (Safety Deposit boxes no longer apply)  
\_\_\_\_\_ Moving expenses  
\_\_\_\_\_ Attendant expenses for a disabled person  
\_\_\_\_\_ Spousal Support payments (Receipts or legal agreement)  
\_\_\_\_\_ T2202A Tuition fees & Education amounts  
\_\_\_\_\_ T2200 Conditions of employment/allowable employment expenses  
\_\_\_\_\_ T101 Exploration & Development expenses  
\_\_\_\_\_ Volunteer firefighter/Search & Rescue certificate  
\_\_\_\_\_ Other (Specify): \_\_\_\_\_  
\_\_\_\_\_ Other (Specify): \_\_\_\_\_  
\_\_\_\_\_ Other (Specify): \_\_\_\_\_

**Dependents**

- \_\_\_\_\_ Child care expenses
- \_\_\_\_\_ Children's fitness & arts receipts (Max \$1,000 per child)
- \_\_\_\_\_ Adoption expenses
- \_\_\_\_\_ Child support payments or receipts
- \_\_\_\_\_ Other (Specify): \_\_\_\_\_
- \_\_\_\_\_ Other (Specify): \_\_\_\_\_
- \_\_\_\_\_ Other (Specify): \_\_\_\_\_

**Self-employment/Rental Income**

- \_\_\_\_\_ Use of home expenses
- \_\_\_\_\_ Tools expenses
- \_\_\_\_\_ Exams for professional certification
- \_\_\_\_\_ Rent/property tax receipts
- \_\_\_\_\_ Small business income and expenses
- \_\_\_\_\_ Rental income and expenses
- \_\_\_\_\_ Commissioned employee expenses
- \_\_\_\_\_ Vehicle log book
- \_\_\_\_\_ Other (Specify): \_\_\_\_\_
- \_\_\_\_\_ Other (Specify): \_\_\_\_\_
- \_\_\_\_\_ Other (Specify): \_\_\_\_\_