



PERSONAL TAX CHECKLIST

YEAR: _____

Please complete and submit to our office with all of your tax documents

CLIENT	SPOUSE
Name _____	Name _____
SIN _____	SIN _____
Date of Birth _____	Date of Birth _____
Phone (H / W / C) _____	Phone (H / W / C) _____
Email _____	Email _____
Citizenship (circle): CDN US Other: _____ US Greencard Y / N	Citizenship (circle): CDN US Other: _____ US Greencard Y / N
Did you own/hold foreign property with a total cost of > \$100,000 CDN at any time during the year (Circle) If yes, provide details Y / N	Did you own/hold foreign property with a total cost of > \$100,000 CDN at any time during the year (Circle) If yes, provide details Y / N

Address: _____ Postal Code: _____

Marital Status: _____ Province of Residence on Dec 31st: _____

Date of Change (if during tax year): _____ Date of Death: _____

Name change to: _____ Contact Person: _____

Dependents (please list all children and relatives)

Name			
SIN			
Relationship to you			
Date of Birth			
Net Income	\$	\$	\$
Indicate Y/N if any of the following apply and attach receipts			
Disability (if 1 st year provide T2201 form)			
Child Fitness Credit			
Child Arts Credit			
Child Care Expenses			
Public Transit Pass			
Tuition/Education			
Universal Child Care Benefit (RC62)			

FOR OFFICE USE ONLY – Date completed: _____

<input type="checkbox"/> Personal Tax <i>Green/Red</i>	<input type="checkbox"/> T1 List	<input type="checkbox"/> Bookkeeping <i>Pink</i>
<input type="checkbox"/> US Tax <i>Blue</i>	<input type="checkbox"/> US List	<input type="checkbox"/> GST <i>Purple</i>

Please tick mark items that are applicable and provide supporting documents

Client Spouse

DEDUCTIONS OR CREDITS

- RRSP Contribution (for 2015 & first 60 days of 2016)
- Medical expenses, premiums paid (not MSP), travel insurance, travel & meals
- Public transit pass (may be provided by school)
- Home renovations – only for seniors/disabled
- First time home buyer
- Pension buy back
- Child/Spousal Support (provide agreement) (*circle*): PAID RECEIVED
- Charitable/political donations
- Disability (T2201)
- Caregiver to a family member
- Moving expense
- Student loan interest
- Retroactive lump sum payments

SELF-EMPLOYMENT

- Business
- Professional
- Farming / Fishing (*circle*)
- Bookkeeping provided by client
- GST registrant
 - Reporting period: _____
 - Who prepares – client / L & L (*circle*)

For each self-employment activity please provide:

- Income and expenses
- Estimated % of sales from internet
- Auto expense details*
- Office in home expense details*
- Asset additions (please provide receipts)

EMPLOYMENT OR COMMISSION

- Wages (T4), Tips
- Employment expenses, T2200 required, Auto expense details*, Office in Home expense details*
- Trade person, apprentice mechanic (*circle*)
- Union dues, professional fees (*circle*)

RENTAL

- Part of principal residence (PR)? Y / N personal % of total home: _____
- Please separate expenses that are only for the rental from those that are for the entire property, if applicable
- Other rental property(s)
- Receipts for major renovations / capital additions
- Purchase/sale during the year – provide statement of adjustments

PRIOR YEAR RETURN/CORRESPONDENCE

- Notice of Assessment (for prior year) – includes Home Buyer's Plan & Life Learning Plan statements
- Copy of Prior Year's Return (if you are a new client)
- CRA Correspondence during the year
- Instalments paid during the year

Client Spouse

INVESTMENT

- Slips: T3, T5, T5008, T5013
- Investment advisor / management / legal fees
- Interest paid on funds borrowed for investment
- Disposals: sales price and cost

OTHER INCOME

- Pensions (CPP, Employment, Foreign, Other)
- Old Age Security (OAS)
- RRSP or RIF withdrawals
- Employment Insurance (T4E)

STUDENT

- Scholarships, bursaries, grants (T4A)
- Tuition, education (T2202)

*Auto and Office in Home expense forms are available from our office.