



**PERSONAL INCOME TAX CHECKLIST**

Name: \_\_\_\_\_ Spouse: \_\_\_\_\_  
 SIN: \_\_\_\_\_ SIN: \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_ Phone: Primary: \_\_\_\_\_  
 \_\_\_\_\_ Phone Secondary: \_\_\_\_\_  
 Primary E-mail: \_\_\_\_\_  
 Secondary E-mail \_\_\_\_\_ Fax: \_\_\_\_\_

Special Instructions: \_\_\_\_\_  
 \_\_\_\_\_

***CHECKLIST OF REQUIRED INFORMATION***

Employment Information:	Y__ N__	Employment Expenses:	Y__ N__
Business Income:	Y__ N__	Rental Income:	Y__ N__
Investments:	Y__ N__	Pension Income:	Y__ N__
RRSP:	Y__ N__	Heath care expenses: (> 3% of income or \$2,044-naturopath not eligible)	Y__ N__
Donations:	Y__ N__	Dependant Information:	Y__ N__
Child Care Expenses:	Y__ N__		
Support Payments:	Y__ N__	Tuition Fees / T2202:	Y__ N__
Public Transport:	Y__ N__	Scholarships / Grants:	Y__ N__
Foreign Income:	Y__ N__	Other:	Y__ N__

Notes: \_\_\_\_\_  
 \_\_\_\_\_



Do you want to income split if beneficial? (Only if you are married or living common-law) Y\_\_ N\_\_

Did you receive income other than what is shown on these slips? (Tips, commissions, etc) Y\_\_ N\_\_

List jobs held during the year and all T Slips

- |    |  |         |
|----|--|---------|
| 1. |  | Y__ N__ |
| 2. |  | Y__ N__ |
| 3. |  | Y__ N__ |

Did you pay any union or professional dues? Receipt enclosed or amount \$ \_\_\_\_\_ Y\_\_ N\_\_

Did you receive a form from your employer indicating that you are eligible to claim employment expenses? (T2200 or TL2) Summary or Receipts Y\_\_ N\_\_

During the last calendar year, did you move to be closer to a new job? Y\_\_ N\_\_

Are you paying back a student loan? If yes - Enclose receipt Y\_\_ N\_\_

Notes/Questions: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

***SELF EMPLOYMENT INCOME***

Did you have any self employment income? Please provide income and expenses related to each business and GST return if you are registered.

Company Name(s): \_\_\_\_\_

**Common Documentation**

1. Summary of income and expenses
2. Receipts, if summary not provided
3. Invoices for asset additions, ie computers etc
4. Details of motor vehicle expenses and travel log book
5. GST Return if registered

Notes/Questions: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



***RENTAL PROPERTIES***

Did you have any rental properties? (Please provide income and expenses relevant to each property - more than 4 on a separate page please)

Y\_\_\_ N\_\_\_

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Did you purchase any rental properties? (Please provide SOA)

Y\_\_\_ N\_\_\_

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Did you sell any rental properties? (Please provide SOA)

Y\_\_\_ N\_\_\_

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Did you refinance any of the properties? (Provide SOA)

Y\_\_\_ N\_\_\_

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Notes/Questions:

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**COMMON DOCUMENTS FOR RENTAL PROPERTIES**

1. Mortgage statements dated December 31 or interest paid during the year (contact your bank if you don't have them).
2. Statement of Adjustments (SOA) and Statement of Receipts and Disbursement for new properties purchased and sold during the year.
3. Property tax statements or amounts spent.
4. Insurance Statements or amount spent on insurance.
5. Line of credit statements, if used for investments or amount paid interest during the year.
6. Mortgage / refinance documents.
7. Summary of rental income and expenses.
8. Expense receipts, if summary not provided.

**INVESTMENT INCOME - OUTSIDE RRSP**

Interest Earning Bank Accounts and deposits

- |          |         |     |     |
|----------|---------|-----|-----|
| 1. _____ | T5 Slip | Y__ | N__ |
| 2. _____ | T5 Slip | Y__ | N__ |
| 3. _____ | T5 Slip | Y__ | N__ |
| 4. _____ | T5 Slip | Y__ | N__ |
| 5. _____ | T5 Slip | Y__ | N__ |

Stock Accounts (US and Cnd \$ ones are considered 2 accounts)

- |          |         |     |     |          |     |     |                     |     |     |
|----------|---------|-----|-----|----------|-----|-----|---------------------|-----|-----|
| 1. _____ | T5 Slip | Y__ | N__ | T3 Slips | Y__ | N__ | Transaction Summary | Y__ | N__ |
| 2. _____ | T5 Slip | Y__ | N__ | T3 Slips | Y__ | N__ | Transaction Summary | Y__ | N__ |
| 3. _____ | T5 Slip | Y__ | N__ | T3 Slips | Y__ | N__ | Transaction Summary | Y__ | N__ |
| 4. _____ | T5 Slip | Y__ | N__ | T3 Slips | Y__ | N__ | Transaction Summary | Y__ | N__ |

Mutual Funds-if not included above

- |          |         |     |     |
|----------|---------|-----|-----|
| 1. _____ | T3 Slip | Y__ | N__ |
| 2. _____ | T3 Slip | Y__ | N__ |
| 3. _____ | T3 Slip | Y__ | N__ |
| 4. _____ | T3 Slip | Y__ | N__ |
| 5. _____ | T3 Slip | Y__ | N__ |



Do you have other investments? What type? \_\_\_\_\_

Did you redeem any of your income trust units during this year? Y\_\_\_ N\_\_\_

Did you incur any of the following expenses for your investments? Y\_\_\_ N\_\_\_

1. Safety deposit box Amount \$ \_\_\_\_\_
2. Interest paid on loans for investment \$ \_\_\_\_\_
3. Other? \$ \_\_\_\_\_
4. Management fees or investment counsel fee \$ \_\_\_\_\_

Notes/Questions:

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**RETIREES AND/OR SENIORS** (Note that all retirees are not seniors and not all seniors are retirees)

Are you receiving CPP? T4 AP Y\_\_\_ N\_\_\_

Are you receiving Old age security pension T4OAS? Y\_\_\_ N\_\_\_

Are you receiving RIF? List

1. \_\_\_\_\_ T4 RIF Y\_\_\_ N\_\_\_
2. \_\_\_\_\_ T4 RIF Y\_\_\_ N\_\_\_
3. \_\_\_\_\_ T4 RIF Y\_\_\_ N\_\_\_

Did you cash in any RRSP?

1. \_\_\_\_\_ T4 RSP Y\_\_\_ N\_\_\_
2. \_\_\_\_\_ T4 RSP Y\_\_\_ N\_\_\_
3. \_\_\_\_\_ T4 RSP Y\_\_\_ N\_\_\_

Did you receive any other pensions?

1. \_\_\_\_\_ T4 RSP Y\_\_\_ N\_\_\_
2. \_\_\_\_\_ T4 RSP Y\_\_\_ N\_\_\_
3. \_\_\_\_\_ T4 RSP Y\_\_\_ N\_\_\_



**GENERAL T1 DEFAULTS - WE WILL ANSWER THESE QUESTIONS ON YOUR TAX RETURN UNLESS YOU TELL US OTHERWISE**

Canadian Citizen - Yes

Provide Information to Elections Canada –Yes

Own Foreign Property at cost over \$100,000? No

**REFRESH YOUR MEMORY - POSSIBLE MISSING INFO**

Other than the information you provided, do you have any other income? Y\_\_\_ N\_\_\_

For example, did you cash out any RRSP or did you pay out or receive support? Y\_\_\_ N\_\_\_

Did you receive any Employment Insurance, WorkSafeBC or Social Assistance benefits? Y\_\_\_ N\_\_\_

Are you married (Does your spouse or common-law partner have income over \$9,600?) Y\_\_\_ N\_\_\_

Do you have any dependants to claim? A dependant can be a child or family member who is living with you. Y\_\_\_ N\_\_\_

Did you have any health care-related expenses? You may be able to claim these for yourself or any of your dependants. Y\_\_\_ N\_\_\_

Payments made to health care professionals (eye doctor, dentist, etc) Y\_\_\_ N\_\_\_

Payments made for glasses/contacts/prescription drugs/other medical items. Y\_\_\_ N\_\_\_

Did you pay for any other health care services for yourself or a member of your household? Y\_\_\_ N\_\_\_

Did you pay premiums for medical insurance? (Blue Cross etc.) Y\_\_\_ N\_\_\_

Does any member of your household suffer from a disability?  
Does anyone have special needs? Y\_\_\_ N\_\_\_

Did you or any of your dependants go to college or university (part or full time) or attend any training courses last year? Y\_\_\_ N\_\_\_

How about any prior years? Y\_\_\_ N\_\_\_



- Did you make any prior donations to charities or political parties? Y\_\_\_ N\_\_\_
- Did you contribute to an RRSP plan? Y\_\_\_ N\_\_\_
- Did you participate in the Home Buyers Plan? Y\_\_\_ N\_\_\_
- Did you or any member of your household purchase public transit passes? Y\_\_\_ N\_\_\_
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### ***DEPENDANTS - CHILDREN***

- How old are the children? (Child care, babysitting, daycare,  
(If under 18-Child tax benefit) Y\_\_\_ N\_\_\_
- If under 6 – did you receive the Universal Child Care Benefit? Y\_\_\_ N\_\_\_
- Will any turn 19 before April first of next year? Y\_\_\_ N\_\_\_
- Did they take part in any recreational activities? (If under 16 – Children’s fitness amount) Y\_\_\_ N\_\_\_

### ***DEPENDANTS - OTHER***

- Is the dependant living with you over the age of 65 or is he/she infirm? Y\_\_\_ N\_\_\_

### ***STUDENTS***

- Do you have a tuition education or textbook amount certificate from a school  
you attended (T2202A or TL11A) - Get it online from the University/College Y\_\_\_ N\_\_\_
- Did you have any scholarship, bursary, research grant or other award income? Y\_\_\_ N\_\_\_
- Do you have a government student loan? Y\_\_\_ N\_\_\_
- Did you claim the full tuition and education amount last year? Y\_\_\_ N\_\_\_

NB: If the client is unable to utilize all of his or her tuition/education amounts, explain transfer and carry forward options.



### ***LIST OF MOST COMMON DOCUMENTS REQUIRED***

1. List all T Slips (for example: T2202, T3, T4, T4A, T4AP, T4E, T4OAS, T4RSP, T5, T5006, T5008, T5013, RC62 etc.).
2. RRSP receipts, monthly bus passes, other receipts (donation, union or professional dues, child care etc).