

PERSONAL TAX CHECKLIST

(✓) IF APPLICABLE TO YOU	PROVIDE
<input type="checkbox"/> New client to Brandy →	Full name, SIN, date of birth, address
<input type="checkbox"/> Have you sold your principal residence?	Purchase & Sales details
<input type="checkbox"/> Has your marital status changed?	Details/dates
<input type="checkbox"/> Children	Name, birthdays if I don't already have that info
<input type="checkbox"/> Became or ceased to be a resident of Canada during the year	Date of status change
<input type="checkbox"/> Spouse	If I am not preparing a tax return for your spouse, I will require their SIN and net income
<u>INCOME ON SLIPS –</u> <i>(Slips can be found online if you don't have them all)</i>	
<input type="checkbox"/> Employment earnings, profit sharing, directors fees,	T4/T5/T5013
<input type="checkbox"/> Pension income: CPP/OAS/Employment pension	T4A(OAS), T4A(P)
<input type="checkbox"/> Retirement allowances, RRSP/RIF income, etc.	T4A, T4RIF, T4RSP
<input type="checkbox"/> Investment Income: Interest, Dividends, Canada Savings Bonds, Capital Gains	T5, T3, T5013, T5008, statements
<input type="checkbox"/> Employment Insurance Benefits	T4E slip
<input type="checkbox"/> WCB benefits	T4, T5007, details
<input type="checkbox"/> Social assistance payments	Full details, T5007
<input type="checkbox"/> Alimony or child support received	Full details
<input type="checkbox"/> Scholarships, bursaries	Details, T4A slip(s)
<u>MISC. INCOME NOT ON SLIPS</u>	
<input type="checkbox"/> Odd jobs, tips	Pay slips, details
<input type="checkbox"/> Loans from employer	Full details
<input type="checkbox"/> Any other employment benefits	Full details
<input type="checkbox"/> Foreign Pensions	Details, foreign slips
<input type="checkbox"/> Foreign interest or dividends	Foreign slips or details
<input type="checkbox"/> Interest – no slip provided	Details, statements
<input type="checkbox"/> Royalty or other invest. income	Details
<input type="checkbox"/> Stocks, bonds, trust units	Transaction slips/details, broker statements
<input type="checkbox"/> Real estate and other properties	Sale documents, details of purchase
<input type="checkbox"/> Other	Full Details

RENTAL INCOME – SEE SEPARATE CHECKLIST

SELF-EMPLOYED INCOME – SEE SEPARATE CHECKLIST

FOREIGN REPORTING REQUIREMENTS –SEE SEPARATE CHECKLIST

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<u>EMPLOYMENT-RELATED EXPENSES</u>	
<input type="checkbox"/> General - required by employer to pay certain expenses	See Employment Expenses Checklist
<input type="checkbox"/> Travel/Auto	See Sample Kilometer Log
<input type="checkbox"/> Office in Home Expenses	See Office in Home Schedule
<input type="checkbox"/> Moving expenses	Details/receipts of charges, T1M
<input type="checkbox"/> Other expenses	Details/receipts of charges
<input type="checkbox"/> Transport employees	Form TL2
<input type="checkbox"/> Union or Association Dues	Official tax receipts
<u>INVESTMENT EXPENSES</u>	
<input type="checkbox"/> Money borrowed to earn invest. income	Record of amounts paid
<input type="checkbox"/> Accounting fees to record income	Details of charges
<input type="checkbox"/> Investment counsel and investment management fees	Details of charges
<u>LIFETIME CAPITAL GAINS DEDUCTION</u>	
<input type="checkbox"/> Assets that would still qualify to claim the enhanced value as \$500,000 capital gains deduction (e.g. farm that property, small business corp. shares sold)	Date acquired, cost, of Dec 31/71 if prior to date
<u>ALL OTHER DEDUCTIONS AND CREDITS</u>	
<input type="checkbox"/> Alimony or separation allowance paid	Record of payment & details
<input type="checkbox"/> Tuition fees over \$100 paid (post-secondary)	Official tax receipt(s)
<input type="checkbox"/> Registered Retirement Savings Plan	Official tax receipt
<input type="checkbox"/> Stocks/bonds rolled over into RRSP	Official tax receipt, details
<input type="checkbox"/> Donations to registered charities	Official tax receipts
<input type="checkbox"/> Unused prior year donations	Full details
<input type="checkbox"/> Amounts paid for child care	Official tax receipts
<input type="checkbox"/> Medical Expenses for any 12 month period ended in the tax year, including private insurance (e.g. Blue Cross, travel health ins.) premiums	Receipts, summaries, etc.
<input type="checkbox"/> Political Contributions paid	Official tax receipts
<input type="checkbox"/> Loss on shares of or loss on loans to a private company	Full details
<input type="checkbox"/> Self or dependent attend University	Form T2202 or T2202A
<input type="checkbox"/> Disability Credit	Approval letter if first year
<input type="checkbox"/> Incurred disability support costs	Full details, Form T929
<input type="checkbox"/> Contribute to support of relative	Full details
<input type="checkbox"/> Parent or parents (over 65) live with you	Full details
<input type="checkbox"/> Oil & Gas, Mining investments	Full details
<input type="checkbox"/> Adoption expenses	Full details
<input type="checkbox"/> Other, if not mentioned	Full details