

# Canadian Personal Income Tax Return Checklist

Taxpayer Name:		Spouse Name:	
Date of Birth:		Date of Birth:	
Email:		Email	
Phone: Cell		Phone: Cell	
Phone: Other		Phone: Other	
Address:	Children	S.I.N.	Date of Birth.
Marital Status:			

***Please answer the following questions:***

Are you a Canadian citizen?	Yes [ ]	No [ ]
If yes, can the CRA provide your name, address and date of birth to Elections Canada?	Yes [ ]	No [ ]
At any time during the year, did you own foreign property with a combined cost greater than \$100,000? (e.g. real property, securities, foreign bank account, etc.)	Yes [ ]	No [ ]
Do you wish to pension split if beneficial?	Yes [ ]	No [ ]
Have you sold or changed use of your principal residence (home or vacation property in 2017)?	Yes [ ]	No [ ]
Which format would you like the client copy of your tax return printed in?	Secure Email: [ ]	Paper: full version [ ]
	Paper: abbreviated version [ ]	
Are you a first time home buyer this year?	Yes [ ]	No [ ]
Have you <b>signed and enclosed</b> your Engagement Letter?	Yes [ ]	No [ ]

***Canadian and Foreign Sources of Income (provide slips, documents or details)***

Employment related (T4, T4E) [ ]	Capital gains [ ]
Investment Income (T3, T5) including backup attachments [ ]	(Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/mutual funds, real estate, personal property, jewelry, works of art, etc.)
Pension/Retiring allowance/Other (T4A) [ ]	
CPP/QPP/OAS (T4A(P)/T4A(OAS)) [ ]	
RRSP, DPSP, RPP, RRIF (T4RSP/T4RIF) [ ]	Business/professional income/expenses [ ]
Partnerships/tax shelters (T5013/T101) [ ]	Auto expenses – include business/personal mileage [ ]
Universal Child Care Benefit (RC62) [ ]	Farming/fishing income/expenses [ ]
	Rental income/expenses [ ]

If home office expenses, please provide : business square feet: \_\_\_\_\_ & total square feet: \_\_\_\_\_

