

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 during the year)	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 signed and enclosed 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 []
Rental income/expenses []	Farming/fishing income/expenses []

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

Deductions and Credits (provide receipts, documents or details)

RRSP/Pension contributions []	Tuition fees/education expense/exam fees(include T2202A) []
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	If transferring, has child signed the T2202A	[]
Union/professional dues	Interest paid on student loans	[]
Child care expenses & Child fitness/Art credit	Medical/attendant care expenses/travel medical insurance	[]
Moving expenses	Charitable donations	[]
Support payments made	Political/municipal contributions	[]
Accounting/legal/investment counsel fees	Income tax instalments/foreign taxes paid	[]
Interest paid on investments	Prior year Notice of Assessment/Notice of Reassessment	[]
Deductible employment expenses (<i>include form T2200</i>)	Other:	[]
Public transit passes	If age 65 or disabled: Home accessibility expenses:	Yes No
# of days spent in the U.S. if greater than 120 in current or 2 previous years:		[]

<i>Please add Additional Information</i>		