

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 [<input type="checkbox"/>]	No [<input type="checkbox"/>]
If yes, can the CRA provide your name, address and date of birth to Elections Canada?	Yes [<input type="checkbox"/>]	No [<input type="checkbox"/>]
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 [<input type="checkbox"/>]	No [<input type="checkbox"/>]
Do you wish to pension split if beneficial?	Yes [<input type="checkbox"/>]	No [<input type="checkbox"/>]
Have you sold or changed use of your principal residence (home or vacation property during the year)	Yes [<input type="checkbox"/>]	No [<input type="checkbox"/>]
Which format would you like the client copy of your tax return printed in?	Secure Email:	[<input type="checkbox"/>]
	Paper: full version	[<input type="checkbox"/>]
	Paper: abbreviated version	[<input type="checkbox"/>]
Are you a first time home buyer this year?	Yes [<input type="checkbox"/>]	No [<input type="checkbox"/>]
Have you signed and enclosed your Engagement Letter?	Yes [<input type="checkbox"/>]	No [<input type="checkbox"/>]

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

Employment related (T4, T4E) [<input type="checkbox"/>]	Capital gains [<input type="checkbox"/>]
Investment Income (T3, T5) including backup attachments [<input type="checkbox"/>]	(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) [<input type="checkbox"/>]	
CPP/QPP/OAS (T4A(P)/T4A(OAS)) [<input type="checkbox"/>]	
RRSP, DPSP, RPP, RRIF (T4RSP/T4RIF) [<input type="checkbox"/>]	Business/professional income/expenses [<input type="checkbox"/>]
Partnerships/tax shelters (T5013/T101) [<input type="checkbox"/>]	Auto expenses – include business/personal mileage [<input type="checkbox"/>]
Rental income/expenses [<input type="checkbox"/>]	Farming/fishing income/expenses [<input type="checkbox"/>]

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

