



PERSONAL TAX CHECKLIST

Family Name(s) _____

Address _____

City _____

Postal Code _____

Is this a new address?

Email address _____

Contact No. _____

Any changes in family information?

- Births
- Deaths
- Marital Status
- Disability

Number of returns to be filed? _____

Have you included these common slips & receipts:

- | | |
|-----------------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> T3 | <input type="checkbox"/> Child care |
| <input type="checkbox"/> T4 | <input type="checkbox"/> Donations |
| <input type="checkbox"/> T4A | <input type="checkbox"/> Instalments |
| <input type="checkbox"/> T4OAS (Old Age) | <input type="checkbox"/> Interest on investment loans |
| <input type="checkbox"/> T4AP (Canada Pension) | <input type="checkbox"/> Interest on student loans |
| <input type="checkbox"/> T4RIF | <input type="checkbox"/> Investment management fees |
| <input type="checkbox"/> T4RSP | <input type="checkbox"/> Medical |
| <input type="checkbox"/> T4E (Unemployment) | <input type="checkbox"/> Property tax |
| <input type="checkbox"/> T5 | <input type="checkbox"/> RC62 (UCCB) |
| <input type="checkbox"/> T5008 (Trading Summary) | <input type="checkbox"/> Rent paid |
| <input type="checkbox"/> T5013 (Partnership Income) | <input type="checkbox"/> RRSP contributions |
| <input type="checkbox"/> T2202A (Tuition) | <input type="checkbox"/> Student rent paid (Ontario only) |
| <input type="checkbox"/> TL11A (Foreign Tuition) | <input type="checkbox"/> Union / professional dues |

Investments: Stock and bond transactions require original cost, gross proceeds on sale and commission on sale
(Please ensure your broker provides a detailed Gain / Loss Report)

Please include any of the following:

- Self employed income and expenses (T2125)
 - Rental property income and expenses (T776)
 - Employment income and expenses (T777)
- (blank forms of the above schedules are available on our website)
- T2200 Declaration of Conditions of Employment (must be signed by employer)
 - Are you a first time home buyer?
 - Did you use RRSP's to purchase home? (HBP)

Foreign Property / Investments:

CRA asks this question every year:

"Did the taxpayer own or hold foreign property at any time in the year with a total cost of more than CAN \$100,000?"

We will answer "no" in all cases unless you tell us otherwise.

If "yes", please have your broker provide a detailed Foreign Investment Report

