

Personal Income Tax Return Checklist

Check one: Existing Client New Client (complete Form T1013)
 Date of Birth _____

NAME(s): _____ TELEPHONE NUMBER: (H) _____

(C) _____

ADDRESS: _____ MARITAL STATUS: _____

SOCIAL INSURANCE NUMBER: _____

DATE OF BIRTH _____ If not filing with spouse, what is spouse's net income: _____

LIST OF DEPENDANTS/CHILDREN – including their incomes and date of birth: _____

DID YOU OWN OR HOLD SPECIFIED FOREIGN PROPERTY (INCLUDING STOCKS & BONDS) WHERE THE TOTAL COST OF ALL SUCH PROPERTY, WAS MORE THAN CDN \$100,000? YES NO

ARE YOU A RECIPIENT OF FUNDS FROM A FOREIGN TRUST? YES NO

DO YOU WANT YOUR NAME, ADDRESS, DATE OF BIRTH & CITIZENSHIP INFORMATION GIVEN TO ELECTIONS CANADA?
YES NO

1) Information Required includes: (PUT # OF SLIPS ENCLOSED)

- T3 T4A(OAS) T4RSP/RIF T5013
- T4 T4A(P) T5 T5018 (Subcontractors)
- T4A T4E RC62 (UCCB) T2202 (tuition details/TL11 for your child)
- T5007 (WCB)

2) Details of Other Income:

- Other employment income (including stock option plans and Election Form T1212)
- Business income
- Partnership income
- Rental income
- Alimony, separation allowances, child maintenance
- Pensions (certain pension income may now be *split* between spouses, U.S. and German Social Security Pensions have special rules)
- Director fees
- Scholarships, Fellowships, Bursaries
- Other: _____

3) Details of Other Expenses

- ___ Employment related expenses – Provide Form T2200 – Declaration of Conditions of Employment
- ___ Tools acquired by apprentice vehicle mechanics
- ___ Business and employment purchases like vehicles, supplies, etc.
- ___ Interest on money borrowed to purchase investments
- ___ Investment counsel fees
- ___ Moving expenses – including cost of maintaining a vacant former residence
- ___ Child care expenses
- ___ Alimony, separation allowances, child maintenance (including divorce agreement, support amount paid)
- ___ Accounting, legal & other professional fees
- ___ Pension Plan contributions
- ___ Adoption related expenses
- ___ Trade person's tools acquired by an employee (T2200-Declaration of conditions of employment required)
- ___ Public transit passes acquired
- ___ Amounts paid for **programs of physical activity and Art programs** for children **under age 16** at any time during the year (under 18 for children with **disabilities**)
- ___ Children's educational coaching payments
- ___ Other: _____

4) Details and Receipts for:

- ___ Registered Retirement Savings Plan (RRSP) contributions
- ___ Professional dues
- ___ Tuition Fees for both full-time and part-time courses for you or a dependant – including mandatory ancillary fees, and Forms T2202, TL11A, B, C and D where applicable)
- ___ Charitable donations (including publicly traded securities)
- ___ Medical expenses for you or a dependant person
- ___ Political contributions

5) Details of Capital Gains and losses

6) Are you disabled or are any of your dependants disabled? YES NO If yes, provide form T2201

7) Details regarding RRSP

- **Home Buyers' Plan** withdrawals and repayments
- **RRSP – Lifelong Learning Plan** repayment

8) Receipts for income tax instalments or payments of tax

9) Do you want your tax refund or credit deposited directly to your account in a financial institution? YES NO

*To start direct deposit, or to change banking information, attach a **void personalized cheque** or **your branch institution and account number**.*

10) Details of Carry Forwards from previous years including losses, donations, forward averaging amounts, registered retirement savings plans.

11) Details of your Pension Adjustment Reversal if you ceased employment and were in a Registered Pension Plan or a Deferred Profit Sharing Plan (T10 Slip)

12) Did you provide in-home care for a parent or grandparent (including in-laws) 65 years of age or over, or an infirm dependant relative? YES NO

13) Interest paid on qualifying student loan.

14) Are you an Apprentice? YES NO

15) Did you receive Universal Child Care Benefit of \$100 per month for each child under 6 years of age? YES NO

If yes; include RC62

16) Are you a First-time homebuyer YES NO

17) Did you sell your principal residence YES NO

18) Did you have any Foreign Income (as per attachment)?

- a) Details of foreign property owned including cash, stocks, trusts, partnerships, real estate, tangible and intangible property, contingent interests, convertible property, etc.
- b) Details of income from or distributions to, foreign entities such as foreign affiliates and trusts

19) Are you a U.S. Citizen, Green Card Holder, or were you, or your parents ***born in the United States?*** YES NO

If yes; you likely have U.S. filing obligations.