

TAX CHECKLIST

Full Name:
 S.I.N.:
 Birthdate:
 Marital Status:
 Citizenship:
 Mailing Address:

 Phone (H):
 Phone (C):
 Phone (Daytime):
 Email:
 Fax:
 Any family members disabled?
 Northern Residents deduction?

Spouse:
 Spouse S.I.N.:
 Spouse Birthdate:
 Spouse Citizenship:
 Child 1 Name:
 Child 1 Birthdate:
 Child 1 S.I.N.:
 Post Secondary? Attach T2202:
 Child 2 Name:
 Child 2 Birthdate:
 Child 2 S.I.N.:
 Post Secondary? Attach T2202:
 New children this year?
 Prior year's T1 (new clients):

INCOME:

- Employment (T4/T4A)
- Pension/Other Income (T4A/T4OAS/T4AP)
- E.I. (T4U)
- Dividends/Interest/Capital Gains (T5/T5013)
- RRSP, DPSP, RPP, RRIF
- Estates/Mutual Funds/Trusts (T3)
- Universal Child Care Benefit (RC62)
- Other:

RECEIPTS:

- Child Care Expenses
- Child Sport/Recreational Expenses
- Disability Certificate (T2201)
- Donations
- Education/Tuition (T2202)
- Interest Paid on Investments
- Investment Counsellor Fees
- Medical Expenses
- Monthly Transit Passes
- Moving Expenses
- Political Donations
- Professional Fees
- RRSP Contribution
- Safety Deposit Box Rent
- Student Loan Interest Statement
- Trading Statements & Relevant Documents
- Union/Professional Fees
- Other:

VARIOUS IMPORTANT DOCUMENTS:

- Employer Authorization for Expenses (T2200)
- Home Buyer Plan (RRSP) Transactions
- Notice of (Re)Assessment for prior year(s)
- Mutual Fund Investment summary statement
- Sale of Property - details
- Sale of Real Estate - lawyer's stmt of adjustments
- Sale of Shares/Investments summary
- Tax Shelters
- Other:

PROVIDE DETAILS OF:

- Alimony/Maintenance Paid or Received
- Automobile Expenses, if eligible (see nxt pg)
- Canada Savings Bonds
- Capital Gains Elections of prior yrs (T664)
- Commission Expenses
- Dependent's Income
- Foreign Income & Foreign Taxes paid
- Income Tax Installments
- List of Foreign Property owned
- Rental Income & Expenses
- Self Employment Income/Expenses
- Signed T1 Engagement Letter
- Spouse's Income
- Electronic Filing? (whole family will be presumed)
- Other:

**USE OF RESIDENCE FOR BUSINESS PURPOSES:
(For office space used in home)**

Square footage of office only
Total square footage of home

Expenses for home that can be claimed:

Hydro (Heat & Electricity)
Insurance for home
Strata or Maintenance fees
Mortgage Interest only
Rent paid for the year or portion
Property Taxes
Water or Sewer Fees
Telephone (Business line & long distance)
Other (Please specify)
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**USE OF VEHICLE FOR BUSINESS PURPOSES:
(Important: The vehicle usage must be completed by you)**

Mileage used for business purposes (in km)
Total mileage driven for year (in km)
OR, Percentage of vehicle use used for business

Did you purchase or sell any vehicles or equipment related to your business in the last tax year?Yes No
(If yes, please provide our office with copies of the paperwork)

Expenses for vehicle that can be claimed:

Description of Vehicle
Fuel
Maintenance & Repairs
Insurance
License & Registration
Interest
Parking
Other (Please specify)

NOTE: It is the client's responsibility to keep all receipts and vouchers for expenses claimed.

NOTES:
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