

Personal Income Tax Return Checklist

Name: _____

SIN: _____

Address: _____

Phone: _____

Email: _____

Date of Birth: _____

Spouse

Name: _____

SIN: _____

Address: _____

Phone: _____

Email: _____

Date of Birth: _____

Any Dependents: Name: _____

Date of Birth _____

Name: _____

Date of Birth _____

Have there been any changes over the past year? ie. Change in marital status

- NOTE: If we did not prepare your previous return please include it.

Please complete the checklist for each person requiring an income tax return prepared:

Income	Yourself	Spouse	Supporting Forms
Business or Partnership Income			Provide Details
Canada (Quebec) Pension Plan			T4A(P)
CRA Refund Interest			Tax Assessment Notice
Capital Gains (Losses)			Provide Details
Dividend Income			T5, T4PS, T5013 and/or T5013A
E.I. Income			T4E
Employment Income			T4, T4A
Foreign Pensions			Provide Details
Guaranteed Income Supplements, Social Assistance, Worker's Comp			T5007
Interest and/or Dividend Income			T3, T5, Provide Details
Old Age Security			T4A(OAS)
Other Employment Income not on T4			Provide Details
Other Pension			T4A
Rental Income			Provide Details
RRSP Income			T4RSP
Spousal Support Payments			Provide Details
Employee Profit Sharing Plan			Provide Details
Universal Child Care Benefit			RC62
Expenses			
Accounting or Investment Fees			Receipts
Allowable Business Losses			Provide Details
Attendant Care Expenses			Provide Details (Receipts)
Charitable Donations			Receipts
Child Care Expenses			Receipts
Child Arts or Fitness Amounts			Receipts
Employment Expenses including car, office at home, etc			Receipts, Form T2200, Form GST370
Interest Expense on monies borrowed to earn investment income			Provide Details
Student Loans Paid			Provide Details
Medical Expenses (incl. insurance premiums)			Receipts
Moving Expenses			Provide Details
Pension Contributions			T4/T4A
Political Donations			Receipts
Public Transit Passes			Receipts
RRSP Contributions			Receipts
RRSP Homebuyer/Lifelong Learning Plan			Provide Details
Withdrawal or repayment information			Provide Details
Spousal Support Payments			Provide Details
Tradespersons – Eligible Tool Expense			Receipts
Tuition Fees (self, spouse, dependents)			T2202A, Receipts
Union Dues or Professional Dues			T4, Receipts
Other			Provide Details