



Tax Return Checklist

Year of tax return _____

Personal Information

	SIN	Date of Birth	Phone
Your Name:			
Spouse's Name:			
Address:			
Email:			

Marital Status: Married Single Common-law
 Separated Divorced Widowed

If your marital status has changed during the year, please provide the date _____

If you are married or common-law, will your tax return be prepared and filed jointly? Yes No

Residence

Province or territory: _____

Did you immigrate to Canada or emigrate from Canada within the last year? Yes No

If yes, please provide the date of arrival _____ or date of departure _____

Are you currently a Canadian Citizen? Yes No

Do you file tax returns for any other countries? Yes No

Did you dispose of any property or investments during the year that were designed to be a principal residence at any time? Yes No

If yes, please provide information such as description of property, date of disposal, sale proceeds, cost, expenses for disposal, adjusted cost at time of disposal and which year property was designated as a principal residence.

T1135 - Foreign Reporting

Did you own or hold foreign property with a total cost of more than \$250,000 (CDN) at any time during the year? If yes, please provide documentation. Yes No

Did you own or hold foreign property with a total cost between \$100,000 and \$250,000 (CDN) at any time during the year? Yes No
If yes, please provide total foreign income and capital gains earned during the year.

Change in Personal and Financial Situation

Date you declare bankruptcy during the year: _____

Date you refinanced a business with new or revised debt: _____

Dependents

Name	Relationship	Date of Birth	SIN	Physically or Mentally Infirm?	Income	Child Care Expenses

If you are a single parent, is the UCCB designated to a dependent? Yes No

Universal child care benefit (UCCB) – Is RC26 slip attached? Yes No

General Income and Deductions

T4 Slips – Employment Income attached? Yes No

T5007 – Social Assistance? Yes No

T4A – Commission and self-employment? Yes No

T4 E – Employment Insurance? Yes No

Other employment income or taxable benefits that are not shown on the T4 slip? _____

- Child care expense (with receipts) for each child? Yes No
- Do you have any Revenu Quebec RL Slips? Yes No
- Are you self-employed? Do you have a summary of your business income/expenses? Yes No
- Spousal support payments made and received? Yes No
- Do you claim disability? Yes No
- Do you claim disability for a dependent? Yes No
- Moving expenses paid and from whom? Yes No
- Deductible employment expenses? Yes No
- Is a signed T2200 form attached? Yes No
- Amount paid for union and professional dues and organization names? _____

Pension Income

- T4A – Pension, retirement and annuity income? Yes No
- T4A(OAS) – Old age security pension slip/foreign pensions? Yes No
- T4A(RCA) – Retirement compensation arrangements? Yes No
- T4RSP – Registered retirement savings plan income? Yes No
- T4RIF – Registered retirement income fund? Yes No
- T4AP – Canada Pension plan benefits? Yes No
- Did you receive any amounts for a retirement income security benefit? Yes No
- Do you plan to split eligible pension income with your spouse or common-law partner? Yes No

Investment Income and Deductions

- T3 – Income from trust allocations? Yes No
- T5 – Investment income? Yes No
- T4PS – Income from profit sharing plans? Yes No
- T5013/T5013(A) – Partnership income? Yes No
- T5008 – Income from securities transactions? Yes No
- Carrying charges/Interest expenses? _____



Did you dispose of any property or investments during the year? If yes, please provide information such as description of property, date of disposal, sale proceeds, cost and expenses for disposal.

Rental Income

Did you own rental property during the year, and have attached the statement of income and expenses? Yes No

Do you currently reside in the rental property? Yes No

RRSP/PRPP Contributions

Is the T-slip for contributions made during the year attached? Yes No

Were any amounts repaid during the year to a home buyers' plan/Life Long earning? Yes No

Other Credits

T2202A – Tuition amount? Yes No

T2202A – Tuition amount claimed on transfer from dependent? Yes No

Receipt or amount of interest on student loan? Yes No

Do you have any receipts for political contributions? Yes No

Receipts for all medical expenses paid during the year for you, dependents and spouse? Yes No

Receipts for charitable donations? Yes No

Were any loans associated with the charitable donations? Yes No

For teachers and early childhood educators, were there any teaching supplies purchased? Yes No

Were there public transit passes for Ontario seniors? Yes No

Receipts for property taxes and rent paid during the year? Yes No

First-time home buyers' amounts? Yes No

Previous Tax Return Information

If you are a new client, do you have copies of your tax returns for the previous three years? Yes No

Do you have copies of all Canada Revenue Agency correspondence? Yes No

Accounting fees for previous year? _____