



Personal Income Tax Checklist

Despite recycling efforts, in 2011 it was estimated that 4 billion trees were cut down to produce paper. As a firm, we are committed to minimizing our environmental footprint. Accordingly, the hard copy you receive of your personal income tax return will not include many of the supplementary schedules used in calculating your refund or balance due.

Upon request, we will gladly provide a full and complete PDF copy of any tax return prepared on your behalf. When providing your personal tax information to the firm, we respectfully request (wherever possible) to be provided with either the original forms, or electronic copies which will not print.

New clients, please complete all sections

Personal Information

Name: _____

Email: _____

Phone: _____ **SIN:** _____

Birthdate: _____

Address: _____

Are you a Canadian Citizen? Yes No

Provide Information to Elections Canada? Yes No

At any point in the year, did you own foreign property costing more than \$100,000 CAD? Yes No

Would you like to sign up for online mail with CRA? I already have Yes No

Spousal Information

Change in the year? Yes No

Marital Status: Married Common Widowed Divorced Separated Single

Date of Change: _____

If we are not preparing your spouse's return, please complete:

Spouse Name: _____ SIN: _____

Birthdate: _____ **Net Income:** _____



Personal Income Tax Checklist

Income

- Were you an employee during the year?
T4, T4A slips received from each employer during the year
T4E, T5007 from Service Canada if you received social assistance
Amount of tips received (if applicable) during the year
- Did you have your own business during the year?
Complete the Business Income and Employment Expenses Worksheet
- *Did you receive any emergency income (benefits and services due to COVID-19)
T4A received from Service Canada
- Were you retired in the year?
T4A, T4RIF slip related to each pension received during the year
T4A(P), T4AOAS slips if you received CPP or OAS benefits in the year
- Did you own any investments outside of a Tax Free Savings Account or RRSP during the year?
Complete the Rentals and Investments Worksheet
- Did you own a rental property in the year?
Complete the Rentals and Investments Worksheet

Expenses

- Did your employer require you to incur costs as part of your employment, including working from home?
Complete the Business Income and Employment Expenses Worksheet
- Did you pay any union or professional dues?
Copy of receipts
- Did you incur medical expenses?
Copy of all medical receipts (Cash registers receipts are not sufficient)
- Did you donate funds to a charity or political party?
Copy of the donation receipt issued
- Were you enrolled in post-secondary school full/part time?
T2202A slip from each school attended
If student loan is in repayment, print off repayment schedule from NSLSC
- Did you pay rent or property taxes in the year?
How much did you pay, and who was it payable too? (Have receipts available)
- Did you have a Canadian digital news subscription(s)?
Copy of receipts

Other

- Did you have to pay personal taxes by instalments for the year?
Statement of account from CRA noting amount paid for the year
- Please provide a copy of all Notices of (Re)assessments received.
- Do you have children?
Complete the Family Supplement Worksheet
- Did you pay or receive support payments (child or spousal)?
Complete the Family Supplement Worksheet
- Do you, or does anyone in your care suffer from a physical or mental disability?
Complete the Family Supplement Worksheet
- Did you adopt a child in the current year?
Copy of receipts associated with adoption
- Did you volunteer as a firefighter, or search & rescue?



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Family Supplement Worksheet

Your Children

Name	Birthdate	SIN	Lives with me (Y/N)	Gender (M/F)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

- If not married or common law, who do your children primarily reside with?
- Did you send your children to camp or pay for daycare (including a nanny)?
 Copy of receipts
- Did you enroll your children in supervised activities lasting over 1 hour in duration?
 Copy of receipts
- Did your child attend post-secondary education?
 Tuition form T2202A from your child's university/college

Support Payments

Support payments were: paid by me received by me

Name: _____

SIN: _____

Child support _____

Spousal Support: _____

Total: _____

Family Disabilities

- Will this be the first year a claim is made?
 Form T2201 – Disability tax credit certificate completed by your doctor

Please call or email us to discuss the specific nature of the disability, as many situations can be unique



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Rental and Investments Worksheet

Investments – RRSP

- Did you contribute to your RRSP before March 1 of the current year?
 RRSP contribution receipts for “the remainder of the year”
 RRSP contribution receipts for the first 60 days following the year
- Did you withdraw money from your RRSP?
 T4RSP slips

Investments – Not in RRSP/TFSA

- Did you sell any securities during the year?
 Capital gains report for the year
 Broker statements for the year if we track the cost bases for you
- Did you earn any income from the investments?
 T5 slips received for the year (these are issued before February 28th)
 T3/T5013 slips received for the year (these are issued before March 31st)

Rental Property

- Was this property purchased or sold in the year?
 Purchase and sale documentation
- Summary of income and expenses for each rental property owned

Address:

of units: _____ Personal portion: _____ %

Total rent revenue: _____

Advertising: _____ Utilities: _____

Property Taxes: _____ Repairs: _____

Insurance: _____ Interest: _____

_____ : _____ : _____

_____ : _____ : _____

_____ : _____ : _____



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Business Income and Employment Expenses Worksheet

Employment Expenses

Do you have a signed T2200 – Declaration of Conditions of Employment
 Please provide a copy

*Did you have to work from home due to COVID-19?
 Please provide a copy of a signed T2200s (if possible)

Complete the Home Worksheet

Does your employer collect GST/HST on their revenue?
 Yes No Unsure

What expenses have you incurred for the year?

Advertising: _____ Meals & Entertainment: _____

Cell Phone: _____ Tools & Supplies: _____

Assistant Salary: _____ Home Office & Automobile: _____ **Complete the Home and Auto Worksheets**

Business Income

Do you have an HST return that needs to be filed?
 Copy of HST form with access code
 Statement of account from CRA with total instalments paid for the year

Are computerized records maintained?
 Profit and Loss statement for the year (if complete)

Summary of business income and expenses for each business operated

What do you do?

Total Revenue: _____ Cost of sales: _____

Advertising: _____ Meals & Entertainment: _____

Insurance: _____ Licenses & Memberships: _____

Office: _____ Salaries & Subcontracting: _____

Travel: _____ Telephone & Internet: _____

Rent: _____ Home Office & Automobile: _____ **Complete the Home and Auto Worksheets**

_____ : _____ : _____



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Home Office Worksheet

Home Offices Expenses

	Business Use: _____ %
Heat: _____	Electricity: _____
Insurance: _____	Maintenance: _____
Mortgage Interest: _____	Property Taxes or Rent: _____
_____ :	_____ :
_____	_____

Automobile Expense Worksheet

Automobile Expenses

- Did you purchase or lease a new car this year?
 Copy of the purchase or lease agreement

Make of car: _____	Year: _____
Total KM driven: _____	Business KM driven: _____
Fuel: _____	Insurance: _____
License: _____	Maintenance: _____
Leasing: _____	Parking: _____
407 Tolls: _____	_____ :
_____ :	_____ :
_____	_____