



**PERSONAL INCOME TAX CHECKLIST**

**TAXPAYER NAME:** \_\_\_\_\_

**TAX YEAR:** \_\_\_\_\_

This checklist is meant to assist you with the assembly of your personal tax information; however, it is by no means comprehensive and includes only the most common tax items. Be sure to include any additional information not specifically mentioned that you suspect may have potential tax implications.

Feel free to contact our office if you have any questions or concerns.

**Please provide us with a completed copy of this form for each taxpayer, checking all boxes that apply:**

<b>INCOME</b>	
<u>Type</u>	<u>Documents to Provide</u>
Employment/commission income	T4 or T4A
Pension and other income	T4A
Scholarships, grants or bursaries	T4A
Old Age Security	T4A(OAS)
CPP Benefits	T4A(P)
Employment insurance benefits	T4E
WCB/social assistance benefits	T5007
RRSP income	T4RSP
RRIF income	T4RIF
Investment income	T5
Trust income	T3
Limited partnership income	T5013
Security dispositions	Summary of Realized Gains/Losses, or T5008
Self-employment income	Receipts or Summary
Rental income	Receipts or Summary
Capital gains/losses	Receipts, documents, etc.
US Social Security	Form 1042-S
Foreign income	Receipts, slips, details, etc.
Other income: (e.g. tips, support payments, income not reported on Tslips, etc.)	
\$ _____	(detail) _____
\$ _____	(detail) _____

<b>TAX DEDUCTIONS</b>	
<u>Type</u>	<u>Documents to Provide</u>
RRSP contributions	Receipts
Union and professional dues	Receipts
Child care expenses	Receipts or Summary, and SIN of caregiver
Moving expenses	Receipts or Summary
Interest on funds borrowed for investing	Bank Statement, a description of what the funds were used for
Investment counsel and/or non-reg. portfolio mgmnt fees	Receipts or Broker Statement
Employment/commission exps	Receipts or Summary
Other deductions: (e.g. support payments, ABILs, legal expenses to collect income, etc.)	
\$ _____	(detail) _____
\$ _____	(detail) _____

<b>TAX CREDITS</b>	
<u>Type</u>	<u>Documents to Provide</u>
Disability amount	T2201
Tuition and education amount	T2202 or Other tax receipts
Interest paid on student loans	Receipts or Summary
Charitable & political donations	Receipts or Summary
Medical expenses	Receipts or Summary
Nursing home or attendant care	Receipts
First Time Home Buyer credit	Address & Closing date
Foreign taxes paid	Receipts, Correspondence, Copy of filed foreign tax return, etc.

<b>OTHER TAX INFORMATION</b>	
<u>Type</u>	<u>Documents to Provide</u>
CRA correspondence	Notices, Statements, etc.
Change in marital status?	Separation Agrmt, marriage date, etc
New child?	Name, DOB and SIN (if applicable)
Did you sell your principal residence	Vendor Statement of Adjustments
Investment Advisor(s): May we contact them to obtain tax information for the year? If YES, i) please provide the following, and ii) phone your broker to give your consent so they will speak to us:	
Name: _____	
Institution: _____	
Phone #: _____	
Email: _____	
Other information: (detail) _____ (detail) _____	

<b>NEW TO OUR FIRM?</b>	If so, please provide the following:
	Personal tax returns for the prior year
	Notices of Assessment and/or Reassessment for the prior year
	A void cheque to have your refund (if applicable) direct-deposited
	Statement of Account showing instalments made for the current year
	Are you a US citizen? Do you hold a Green Card?
	Did you file a T1135 last year? (Foreign investments or property with a cost of greater than \$100,000)