

Personal Income Tax Return Checklist

If your contact information has changed during the year, please let us know .

Name: _____

Address: _____

Phone Number: _____

E-mail Address: _____

Marital Status Change: _____ Date: _____



Please indicate if any of the below situations apply to you

- At any time in the year you owned foreign assets with a cost greater than \$100,000
- At any time in the year you loaned or transferred property or funds to a non-resident trust
- You received any funds or property from a trust not resident in Canada for which you were a beneficiary
- You owed money to a non-resident trust to which you were a beneficiary
- You, your spouse or parents are green card holders or U.S. citizens
- Are you on title for a home someone else is the beneficial owner of?
- Did you sell a house?
- Did you change the use of your house/rental property?

Deductions and Credits (provide receipts, documents or details) – provide a summary as well where possible. Ask the pharmacy for an annual summary for prescriptions.

RRSP Contributions		Tuition fees/education amount T2202	
Union/Professional Dues		Interest paid on student loan	
Child care expenses – often reviewed by CRA when > \$5,000		Medical/attendant care expenses – often reviewed by CRA when > \$5,000	
Moving expenses		Charitable donations (pledges not deductible)	
Support payments made		Political/municipal contributions	
Investment counsel fees (certain legal fees)		Foreign taxes paid (often reviewed by CRA when claimed)	
Interest paid on loans to earn investment income		Deductible employment expenses (let us know if you need more information)	
Purchase of a first-time qualifying home (Credit available)		Other deductions/expenses/credits	
First-Time Home Buyers Plan			

Canadian and Foreign Sources of Income (provide slips, documents or details)

<p>Birth of a child, name and date of birth</p>		<p>Capital Gains (Provide proceeds, actual cost, commission fees, dates of acquisition and disposition of stocks/bonds/mutual funds, real estate, personal property, jewelry, works of art, etc.)</p>	
<p>Most T4/T4A/T4AP/T4RSP etc type slips are available online. If you have not yet received one let us know and we may not need it.</p>		<p>Self-employed (let us know if you need a schedule – no receipts needed)</p>	
<p>Provide entire package from the investment broker in the order provided. Even better if they can upload it to us directly.</p>		<p>Sale or purchase of any real estate, personal property > \$1,000, jewelry or works of art. Provide original purchase and sale documents.</p>	
<p>Many T3 slips do not arrive until much later. If only T3 slips are outstanding, submit your package and we will add them when available.</p>		<p>Business/professional income/expenses – ask us if you need a spreadsheet to summarize – no receipts needed.</p>	
<p>Did you sell a house? If your principal residence – provide year of purchase and sale price. If you owned more than one property during the same period, talk to us about tax planning.</p>		<p>Rental income/expenses – ask us if you need a spreadsheet to summarize – no receipts needed.</p>	
<p>Are you listed on a bank/investment account or house title with someone else and you will not be equally sharing in income/gains (possible UHT filing and/or Bare Trust Agreement and Filings required). See our mailout for updates.</p>		<p>Farming/fishing income/expenses</p>	
<p>Spousal support</p>		<p>Other sources of income</p>	
<p>Adoption Expenses</p>		<p>Moving expenses if for work/school may be deductible</p>	