Personal Tax Return Checklist

Taxpayer's Name	
Social Insurance Number	
Year-End	
	I hereby certify that the information completed below is a true and complete response. I acknowledge that the responsibility for completing true and accurate tax returns is mine alone.

We require a separate form for each taxpayer. Some expenses can be claimed by either spouse – DO NOT DUPLICATE THESE – include in one tax payer only and we will allocate.

To prepare your year-end tax return we need to gather some information from you. It is important that you answer all questions completely as there could be severe tax consequences for incorrect information. More information is better than less. All questions are in relation to the tax year being completed or as at 31 December unless otherwise mentioned. If the answer to any question is "Yes" please supply additional details. These questions all relate to your non-business activity.

THIS IS NOT A COMPREHENSIVE CHECKLIST. PLEASE NOTIFY US OF ANYTHING ELSE THAT MAY EFFECT YOUR TAX RETURN.

DO NOT DELETE ANYTHING FROM THIS CHECKLIST – ANSWER YES OR NO TO EVERY QUESTION.

Prior Year Return

If we don't already have them, we will need a copy of the prior year's T1 return and resulting Assessment Notice.

Information Slips & Receipts

Please scan all relevant information slips and send with this document. Here are examples of the slips that you may have (this is not exhaustive):

- All information Slips (T4, T3, T5, T4E, T4A, T4AP, T4RSP, T4RIF, T5013)
- Old Age Security and CPP benefits
- Other Pensions and Annuities
- Employment insurance benefits
- Social assistance payments
- Workers compensation Benefits
- RRSP contributions
- Universal Child Care Benefit Confirmation (RC62)
- Disability Tax Credit Certificate (T2201)
- Declaration of Conditions of Employment (T2200)

For completeness you may choose to list the slips/forms here (press tab in the last row to add another):

Type	Issuer

Personal Tax Return Checklist

General Information

#	Question	Response
1	What was your residential address?	
2	What was your marital status?	
3	Has your marital situation changed from last year?	
4	What is your spouse's name, SIN and DOB?	
5	Are you a Canadian Citizen?	
6	If Yes – do you authorize the CRA to give your details to Elections Canada?	
7	Did you hold foreign property (includes non-Canadian shares) at any time in the tax year with a total cost of more than CAD$100,000?	
8	Are you, or any of your dependants, disabled or infirm?	
9	Did you buy or sell your principal residence during the year?	
10	Are you a member of clergy?	
11	Are you a US Citizen or Permanent Resident?	
12	Did you pay any tax by instalments last year?	
13	Did you immigrate to Canada or emigrate from Canada during the year?	

Dependants

Include any new children since last return (or all, if this is our first return)

Full Name	Address (if not yours)	Relationship	DOB	Disabled? Infirm?	Income

Income

#	Question	Response
1	Are you a shareholder or partner in any organization that we do not prepare tax information for?	
2	Do you own a rental property?	
3	Did you withdraw funds from an RRSP during the year?	
4	Did you receive any taxable benefits from an employer or business that were not included in a T slip (such as access to a company vehicle, etc.)?	
5	Did you receive any income not reported on an attached information slip or already covered?	
6	Did you sell any investments not included in a T slip?	
7	Do you own any bonds or GICs that do not produce interest income each year?	
8	Did you receive any spousal or child support payments?	

Personal Tax Return Checklist

BTL CHARTERED PROFESSIONAL ACCOUNTANTS

Deductions

Did you incur any of the following expenses not included in slips (scan & send relevant documentation – add totals to the response column):

#	Question	Response
1	Child care*	
2	Moving (more than 40km)*	
3	Support for a child, spouse or common-law partner	
4	Tuition/education	
5	Interest paid on student loans	
6	Transit passes	
7	Children's arts & fitness activities*	
8	Charitable Donations*	
9	Home accessibility*	
10	Medical Expenses*	
11	Union/Professional Dues	
12	Employment/commission expenses not reimbursed	
13	Carry costs for investments	
14	Does anyone over the age of 65 with income under $20,000 live with you (other than your spouse)?	
15	Other eligible deductions	

* Do not include on BOTH spouses checklist – only one.

Other

Please use the space below to document anything else that we might need to know.

SUBMITTING THIS FORM TO US MEANS THAT YOU AGREE WITH OUR TERMS AND CONDITIONS AND CERTIFY THAT YOU HAVE NOT OMITTED ANY RELEVANT INFORMATION AND THAT ALL INCOME HAS BEEN REPORTED. WE TAKE NO RESPONSIBILITY FOR THE CONSEQUENCES IF ANY INFORMATION IS IN ANY WAY INCORRECT OR MISSING.