

## PERSONAL INCOME TAX RETURN CHECKLIST

The Government of Canada will be phasing out cheques by April 2016, please provide us with a VOID cheque to set up your direct deposit for refunds.

1. **Provide current contact information:**

Name: \_\_\_\_\_

Phone number: \_\_\_\_\_

Email address: \_\_\_\_\_

2. **Provide any details of changed personal status (married, divorced, widowed, birth of children, etc.) or if you have moved during the year.**

Details: \_\_\_\_\_

Details: \_\_\_\_\_

3. **Provide a copy of the previous years' Notice of Assessment or Reassessment and any correspondence received from Canada Revenue Agency (CRA).**

4. **All information slips such as T3, T4, T4A, T4A(OAS), T4A(P), T4E, T4PS, T4RIF, T4RSP, T5, T10, T2200, T2202, T101, T5007, T5008, T5013, T5018 (Subcontractors), RC62.**

5. **Business/Self-employment/Rental income (unincorporated):**

- Revenue and expenses for the year (complete statement showing all business activities),
- Business investments – provide details ,
- Loans payable – provide details,
- Asset additions – provide details and receipts,
- Business use of home – total square footage of home and square footage of office space, utilities, mortgage interest, property taxes, repairs and maintenance, insurance,
- Vehicle usage for business – total kilometres driven in the year, total kilometres driven for business, vehicle details, vehicle repairs, gas and oil costs, repairs and maintenance, insurance, parking, leasing or purchase details.

6. **Details of other income for which no slips have been received such as:**

- Other employment income (including stock options plans),
- Partnership income,
- Alimony, separation allowances, child maintenance,
- Pensions,
- Professional or Director fees,
- Scholarships, fellowships, bursaries,
- Universal Child Care Benefit.

**7. Details of other expenses such as:**

- Employment related expenses (provide form T2200),
- Interest on money borrowed to purchase investments,
- Investment counsel fees,
- Moving expenses,
- Alimony, separation allowances, child maintenance,
- Accounting fees,
- Pension plan contributions,
- Adoption related expenses,
- Public transit passes,
- Student loan interest,
- Property taxes,
- Rent expenses (including dates, total amount and landlord's information),
- Tradesperson's tools expenses.

**8. Details and receipts for:**

- Registered Retirement Savings Plan (RRSP) contributions,
- Professional dues,
- Tuition fees for full-time and part-time courses for you or a dependant (including forms T2202, TL11A, B, C and D where applicable),
- Child care expenses,
- Amounts paid for programs of physical activity or arts for children under age 16,
- Charitable donations,
- Political contributions.

**9. Details of capital gains and losses realized during the year.**

- 10. Details and receipts for medical expenses for you or a dependant (including out of country travel insurance, details of travel expenses for medical services not available in your area [greater than 40 km one-way] and certain medical related modifications to new or existing home).**
- 11. Are you or any of your dependants disabled? Provide form T2201 Disability Tax Credit Certificate.**
- 12. Are you the caregiver for any infirm family members?**
- 13. Details regarding RRSP - Home Buyers' Plan withdrawals and repayments; RRSP – Lifelong Learning Plan repayment.**
- 14. Did you purchase a home for the first time during the year?**
- 15. Details of any foreign property owned at any time during the year. This includes such things as cash, stocks, trusts, partnerships, real estate, tangible and intangible property, etc.**
- 16. Details of any income from, or distributions to, foreign entities such as foreign affiliates or trusts.**
- 17. Details of income tax installments or payment of tax.**
- 18. Are you a U.S. citizen, Green Card holder or were you or your parents born in the United States? If so, you likely have U.S. filing obligations.**