

Name <input style="width:90%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
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Phone <input style="width:90%;" type="text"/>	Email <input style="width:90%;" type="text"/>													
Occupation/Employment <input style="width:90%;" type="text"/>	Marital Status <input style="width:90%;" type="text"/>													
Name of Spouse or Common Law Spouse <input style="width:98%;" type="text"/>														
Income of Spouse if we are not preparing <input style="width:90%;" type="text"/>	Date of Birth <table border="1" style="display:inline-table; border-collapse: collapse;"><tr><td>M</td><td>M</td><td>D</td><td>D</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	D	D	Y	Y	Y	Y					
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Did you sell your primary residence in the current tax year?

Y	N
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Are you a Canadian Citizen?

Y	N
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Do you agree to allow CRA to provide your personal information to Elections Canada to register you as a voter?

Y	N
---	---

Did you own foreign property that cost more than \$100,000 Cdn?

Y	N
---	---

Do you require your return completed by a certain date, if so please state date

M	M	D	D	Y	Y	Y	Y
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How were you referred to us (please check)

The Shoppes Publications Internet Referral Yellow Pages Other

	YES	NO	N/A
Did we prepare your last years return? <i>If we did not prepare your last years tax return, please enclose this along with information on any carry forward amounts not included in those returns</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was your last years tax return assessed as filed? <i>Please enclose a copy of the Notice of Assessment.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay tax installments in the current year? <i>If yes, please indicate the amounts paid. Federal installments</i> <input style="width:100px;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If you are entitled to a refund, do you wish it to be deposited directly into your bank account? <i>(Attach a voided personalized cheque; indicate if this is to apply to all refunds or specific ones: income tax, GST credit)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Personal Income Tax Checklist

INCOME

- Provide all slips (T4, T5, T3, T4RSP etc.)
- Do you have rental income?
- Do you receive alimony or taxable child support? Did this start in the current year?
- Did you sell investments, real estate, etc.? Please provide Capital gain/loss statement.
- Do you have business income?
- Do you receive any bursaries?
- Do you have any other sources of income?

DEDUCTION & CREDITS

- Provide all slips (ie. RRSP, FHSA, donations, tuition, union dues, etc). If you have donations for the current year, have you or your spouse/common law partner claimed any donation credits in any of the last 5 taxation years?
- Did you have medical expenses for yourself (including premiums for health insurance), your spouse or common-law partner, or any dependent children (also please include nursing home care and trips to doctors or hospitals over 40km)
- Do you have moving expenses (Moved 40km closer to a new place of work)?
- Do you pay alimony or have deductible child support?
- Do you have child care expenses (including camp)?
- Did you adopt a child during the current tax year?
- Did you have interest expense as a result of investment activities?
- Did you pay investment advisor fees or fees for accountants relating to your investments?
- Are you, your spouse or dependent disabled? (Form T2201 is required if not previously submitted and approved)¹
- Do you have attendant care expenses?
- Did you during the year incur any costs related to fertility-related procedures including IVF?
- Did you use the Home Buyers Program (RRSP) for purchasing your home?
- If you own your home, please provide your property taxes paid.
- Did you purchase a new home in the current year as a first-time home buyer? Date of purchase:
- If you rent, please provide rental receipts for the year and your landlord's name. _____
- Did you purchase transit passes (for anyone over the age of 65)?
- Do you have tuition expenses or examination fees, or did your dependents not claim their entire entitlement to these?
- Did you pay interest on student loans in the current year?
- Are you a volunteer firefighter or a search + rescue volunteer?
- Did you perform renovations on your home in the current year to make it safer and more accessible for a senior family member?
- Did you have any eligible teaching supplies that were purchased for teachers and early childhood educators only?
- Do you have expenses as a requirement of your employment?
(ie. Vehicle, home office, supplies, etc. Form T2200 is required)²
- Did you during the year sell any house, cottage or vacant land that your name was on title for during the year?

NEW

- Do any of the following apply?
 1. Are you on title of a relatives real estate property? Or have you co-signed on a mortgage?
- 2. Are you listed on a bank account or investment account of a family member other than your spouse?
 3. Have you had any situations where legal counsel used the term "Bare Trust"?
- Did you own a rental property during the year and do you rent it through Air BnB? (Please complete the rental checklist and note it is rented through Air BnB)
- Did you during the year incur renovation costs allowing a family member to live with you? (Multigenerational Home Reno Tax Credit)

1. Can walk 100 metres but only by taking an inordinate amount of time. Receiving life sustaining therapy. Does not have the mental functions necessary for everyday life such as adaptive functioning memory, problem-solving. Is markedly restricted in daily living functions.

2. Please complete the Business Claims and Employment Expenses Form.

Please call or visit our website for additional checklists.