



Common Accounting
Business Services

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PERSONAL TAX CHECKLIST

Family name _____ Name _____

DOB _____
 DD MM YYYY

Your sex male/ female X _____

Your current status

Authorization signature

- Citizen
- Permanent resident
- Visitor by permit
- Native

Your current marital status

- Never married
- Married
- Widowed
- Legally separated
- Annulled marriage
- Divorced
- Common-law

- Copy of last year's tax return NOA "Notice of Assessment" from Canada Revenue Agency (CRA)
- Any changes to your address, phone #, SIN, marital status, dependents information, etc.

Current address _____

BACKGROUND INFORMATION ON YOU:

INCOME:

- ⊕ T4 slips (Work, RRSP withdrawals, UIC, OAS, CPP, etc.)
- ⊕ T5 slips (investments and bank interest)
- ⊕ T3 slips (investments and mutual funds)
- ⊕ All other income (i.e.: Canada Savings Bond redemptions, alimony and child support)

DEDUCTIBLE EXPENSES:

- ⊕ Tuition for you and/or your dependents
- ⊕ Charity donation receipts
- ⊕ Political donations
- ⊕ RRSP contributions
- ⊕ Tax shelter slips
- ⊕ Professional and/or Union dues
- ⊕ Alimony, separation and child support payments
- ⊕ Moving expenses (if 40 kilometers closer to new work location)
- ⊕ Child care costs
- ⊕ Medical expenses (if greater than 3% of your income)
- ⊕ Safety deposit boxes

EMPLOYEE AND COMMISSION SALESPERSON EXPENSES:

- ⊕ Meals and entertainment
- ⊕ Automobile expenses (total kilometers, work kilometers, gas, repairs and maintenance, parking, insurance, interest on car loan and/or lease costs)
- ⊕ Equipment not supplied by your employer (i.e. cellular phone, safety equipment)
- ⊕ T2200 tax form signed by your employer

RENTAL INCOME: how many properties No_____

- ⊕ Summary of rent received for each property
- ⊕ Mortgage interest statement for deductible interest
- ⊕ Summary of property taxes, insurance, repairs and maintenance, utilities and other costs of the property
- ⊕ Copies of legal paperwork for the purchase or sale of property

CAPITAL GAINS: how many different institutions No_____

- ⊕ Purchase price of your investments (stocks, bonds, vacation property, real estate, rare collectible items like paintings, jewelry, stamps, coins and books)
- ⊕ Summary from your broker of transactions during the year
- ⊕ Information on loans taken out to finance investments

SELF EMPLOYED BUSINESS INCOME AND EXPENSES:

- ⊕ Summary of revenue during the year (less GST charged)
- ⊕ Summary of expenses (accounting and legal, advertising and promotion, business licenses, property taxes, insurance, interest and bank charges, office and telephone, meals and entertainment, travel, rent, repairs and maintenance, equipment purchased or leased (less total GST paid on expenses))
- ⊕ Summary of shared business and personal expenses: Automobile expenses (total Km's, business Km's, gas, repairs and maintenance, insurance, interest on car loan or lease on car)
- ⊕ Home office expenses (rent, utilities, repairs and maintenance, telephone, property taxes, insurance, and % used for office)