

INCOME TAX CHECKLIST

For: _____
(Your Name)

Please gather the information listed below, if applicable, and send it to us in this envelope as soon as possible.

Are you a US citizen? Yes / No

Client Copy (please select) Paper

CD (PDF format)

	Yes/No		Yes/No
T3's T4's, T5's, T5013's and any other Government slips		Details if you hold foreign property with a Canadian cost in excess of \$100,000	
Pension and other benefit slips		Are you a beneficiary of a foreign trust or estate?	
RRSP contribution slips		Have you made a contribution to a foreign trust?	
Tuition fee and education slips		Details of all tax shelter investments	
Medical expense receipts		Details of interest expense and carrying charges during the year	
Detail of premiums paid for coverage under a private health or dental plan		Details of moving expenses	
Details of alimony or separation allowance paid or received		Professional dues, child care expense receipts, etc.	
Total rent paid during the year and name of landlord or property taxes paid and municipality (if applicable)		Details of tax installments made	
Financial statements or other data for property, business, professional, and self-employment income (if we have not already prepared them)		For all dependents, if not already provided, please submit, name, relationship, date of birth, official tuition receipt, any rent, or property tax paid and net income. Additionally, please inform us if the dependent has any disabilities.	
Any correspondence received during the year from Canada Revenue Agency including Notice of Assessment		If you are entitled to deduct employment expenses, attach signed Canada Revenue Agency Form T2200 and breakdown of related expenses, i.e. auto, home, office, entertainment & promotion etc.	
Details of purchases and disposals of capital property, i.e. stocks * (include on separate schedule)		Details of borrowings from your RRSP if you utilized the Home Buyers Plan	
Interest paid on investment loans		Brokers' Statements, if available, showing purchases and disposals of capital property	
Charitable donations and political contribution receipts			

* For example:

Stock # of Shares Date of Purchase Purchase Price Commissions Sale Price

Notes

1. Wherever receipts are indicated, the actual receipts are required and not just the cancelled cheques.
2. The list is not all inclusive. If you are not sure if a slip may be used on your personal income tax returns, please send it.
3. Enclosed are home office and automobile expense work sheets for your convenience.

