



PERSONAL INCOME TAX CHECKLIST (NEW CLIENTS ONLY)

PERSONAL INFORMATION

- Name, Address, Birthdate, SIN - You
- Name, Address, Birthdate, SIN - Spouse/Common Law Spouse
- Name, Address, Birthdate, SIN - Children

PRIOR YEAR INFORMATION

- Copy of your **LAST** tax return
- Copy of your **LAST** Notice of Assessment

TAX SLIPS & OFFICIAL RECIEPTS

- | | |
|--|---|
| <input type="radio"/> T3, T4, T5 & All Other T-Slips | <input type="radio"/> Rental Income & Expenses |
| <input type="radio"/> RRSPs Contributions | <input type="radio"/> Business Income & Expenses |
| <input type="radio"/> Child Care Expenses | <input type="radio"/> Employment Expense Summary
(T2200 from employer) |
| <input type="radio"/> Union & Professional Dues | <input type="radio"/> Capital Gain & Loss Summary |
| <input type="radio"/> Tuition Fees (T2202) | <input type="radio"/> Business Investment Losses |
| <input type="radio"/> Charitable & Political Donations | <input type="radio"/> Business Investment Consultation Fees |
| <input type="radio"/> Medical & Dental Expenses
(including premiums paid for extended benefits) | <input type="radio"/> Interest Paid on Loans for Investments |
| <input type="radio"/> Attendant Care Expenses for a Disabled Person | <input type="radio"/> Legal Expenses to Collect Alimony, Pension or
Retiring Allowances |
| <input type="radio"/> Buy First Home | <input type="radio"/> Moving Expenses (if you moved 40+Kms for a new
job or work location, school or new business) |
| <input type="radio"/> Sell Home | |