

2011 Personal Tax Checklist

Name _____

Address (if any changes) _____

E-mail _____

Income	Type of slip
Salaries, wages, employment income	<input type="checkbox"/> T4 <input type="checkbox"/> T4A
Pension income, OAS, CPP, RRSP, RIF and/or Foreign pension income	<input type="checkbox"/> T4 <input type="checkbox"/> T4A(P) <input type="checkbox"/> T4A(OAS) <input type="checkbox"/> T4(RIF)
Interest, dividends, foreign investment, trust income, mutual funds, etc.	<input type="checkbox"/> T5 <input type="checkbox"/> T3 <input type="checkbox"/> T4(PS) <input type="checkbox"/> T5008 <input type="checkbox"/> manual lists
EI Benefits	<input type="checkbox"/> T4(U)
Rental Income	<input type="checkbox"/> See separate checklist for rental properties <input type="checkbox"/> T5013
Capital Gains/losses	<input type="checkbox"/> Buy/sell slips <input type="checkbox"/> brokers statements <input type="checkbox"/> T5008
Alimony and/or Child support	<input type="checkbox"/> Amount, Pursuant to written separation agreement
RRSP income/withdrawals	<input type="checkbox"/> T4(RSP)
Other income (IAAC income, bursaries, retiring allowances)	<input type="checkbox"/> T4(A) <input type="checkbox"/> Listing
Income from self employment – sole proprietor/partnership/commissions	<input type="checkbox"/> T5013 <input type="checkbox"/> Financial statements <input type="checkbox"/> See separate checklist for summary of Revenues and expenses
Universal child care benefit	<input type="checkbox"/> RC62
Social assistance – WSIB, Supplements	<input type="checkbox"/> T5007, <input type="checkbox"/> T4A(OAS)

<i>Deductions</i>	<i>Type of slip/backup</i>
<input type="checkbox"/> RRSP contributions/ <input type="checkbox"/> RSP/ <input type="checkbox"/> pension adj. <input type="checkbox"/> Pension adjustment reversal	<input type="checkbox"/> RRSP <input type="checkbox"/> T4 <input type="checkbox"/> T10
Union dues and/or Mandatory professional dues	<input type="checkbox"/> T4 <input type="checkbox"/> receipt
Child care expenses	<input type="checkbox"/> receipts <input type="checkbox"/> Name, SIN, T4 provided to caregiver
Moving expenses	<input type="checkbox"/> T1M (see CRA website or request information from us) <input type="checkbox"/> Listing of expenses
<input type="checkbox"/> Carrying charges, interest on money borrowed to invest <input type="checkbox"/> safety deposit box rental <input type="checkbox"/> investment counsel fees	<input type="checkbox"/> statement from bank <input type="checkbox"/> receipt
Employment expenses	<input type="checkbox"/> T2200 signed by employer, <input type="checkbox"/> listing of expenses
<input type="checkbox"/> Alimony <input type="checkbox"/> child support paid	<input type="checkbox"/> Amount
<i>Tax Credits</i>	<i>Type of slip/backup</i>
Amount for children born after 1991 (claimable by one spouse only)	<input type="checkbox"/> # of children to claim
Public transit tax credit	<input type="checkbox"/> provide transit passes
Children fitness/activity tax credit	<input type="checkbox"/> provide receipts, must be for a program for more than 8 weeks.
Tuition (Post secondary)	<input type="checkbox"/> T2202A, if transferred from a child, please ensure they sign the back of the form
Interest on student loans	<input type="checkbox"/> receipts
Medical expenses	<input type="checkbox"/> receipts
Donations	<input type="checkbox"/> official receipts

Other Deductions & Credits		Documentation required
	Ontario tax credit – property taxes or rent	<input type="checkbox"/> provide property taxes or rent (including Landlord, address, and rent in the year) <i>Note this is for low income taxpayers only.</i>
	Income taxes paid by installments	<input type="checkbox"/> Provide statement from CRA

Other information	Documentation
Did your marital status change in the year? If so, please provide:	<ul style="list-style-type: none"> • Date of change • Your spouse's SIN • Your spouse's Name • Your spouse's date of birth
Are you living in a common law relationship? If so, please provide:	<ul style="list-style-type: none"> • Date of union • Your partner's SIN • His/her name • His/her date of birth
Were any children born to you during the year? If so, please provide:	<ul style="list-style-type: none"> • Childs SIN (if applicable) • Name • Date of birth
Did any of your dependants earn income in the year?	Consider preparing a tax return for them?
Did you support any other dependants during the year?	Provide details.
Were you or a dependent blind or severely impaired during the year?	Please have your Doctor complete a T2201
Are you a Canadian citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you own or hold foreign property at any Time in the year with a total cost of more than \$100,000 Cdn?	Provide details
Do you still want to e-file?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please include a copy of your 2010 Notice of Assessment for our files/review	<input type="checkbox"/> Yes <input type="checkbox"/> No
If we believe it is tax effective to pension income split with your spouse, do you authorize us to do this?	<input type="checkbox"/> Yes <input type="checkbox"/> No