

**PERSONAL INCOME TAX CHECKLIST
FOR THE YEAR _____**



Donnelly & Co. LLP
Chartered Accountants

1. Personal information

	Name	SIN	Date of birth	Phone Number
Taxpayer				
Spouse				
Address				

E-mail address: _____

Marital Status: Married Single Common-law Separated
 Divorced Widowed

Date of change in marital status _____, if not included below:

Spouse or common-law partner's net income _____

2. Dependants

Name	Relationship	SIN	Date of birth	Income

3. Elections Canada

Do you wish to authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors. Yes No

4. Foreign Reporting

Did you own or hold foreign property with a total cost of more than \$100,000 CAN at any time during the year? (Please complete the attached Foreign Reporting Questionnaire) Yes No

(x) If Applicable to you

Provide

5. Employment Income

_____ Regular earnings	All T4s or pay slips
_____ Odd jobs, tips	Pay slips, details
_____ Director's fees	T4s or details
_____ Profit sharing income	T4PS slips
_____ Loans from employers	Full details
_____ Any other employment benefits	Full details

6. Salary Employee / Employment Related Expenses

_____ General - required by employer to pay certain expenses	T2200 - Must be signed by employer
_____ Travel/auto (see auto schedule)	
_____ Moving expenses	Details of charges
_____ Other expenses	Details of charges
_____ Transport employees	TL2 - Must be signed by employer
_____ Union or association dues	Official tax receipts

7. Commission Employee Related Expenses

_____ General - required by employer to pay certain expenses	T2200 - Must be signed by employer
_____ Travel/auto (see auto schedule)	Record of expenses and calculation of business portion of use
_____ Sales expenses	Record of expenses
_____ Office in home	T2200 & details of area used, and expenditures such as utilities, heat, property tax, insurance, repairs & maintenance and interest.

8. Pension, Retirement, Annuity Income

_____ Old Age Security	T4A(OAS) slip
_____ Canada or Quebec Pension	T4A(P) slip
_____ Foreign (e.g. U.S. Social Security)	Details, foreign slips
_____ Other Employment Income (including retiring allowance)	T4A
_____ Registered Retirement Income Fund	T4RIF
_____ Withdrawal from a RRSP	T4RSP slips
_____ Annuity payments	Information slips

Authorization to split pension income between spouses ?

Yes

No

9. Income from Self Employment

_____ General (Note if GST included or separated)	Record of all revenues & expenses
_____ Assets purchased or sold during year	Dates, descriptions, details
_____ Any partners	Name(s), SIN, % ownership
_____ Salary paid to spouse	Details of work done
_____ Inventory	Value of closing inventory
_____ Accounts receivable and/or payable	List of each
_____ Any special elections in prior years	Details

(x) If Applicable to you

Provide

10. Investment Income

- _____ Interest - saving accounts T5 slips
- _____ Term deposits or GICs T5 slips or details
- _____ Mutual fund investment income T3 slips or statements
- _____ Dividends - Canadian corporations T5 slips
- _____ Interest - Canada Savings Bonds T5, T600 slips
- _____ Interest - Money Market Funds Investment income summary from broker
- _____ Interest - joint account with spouse Details of split
- _____ Interest - mortgage or other loans Details, amortization schedule
- _____ Foreign interest or dividends Foreign slips or details
- _____ Royalty or other investment income Details
- _____ Partnership income T5013
- _____ Other T5006 or other information

Did you dispose of property during the year? If so, provide the following details:

Description of Property	Date Acquired	Date Disposed	Sale Proceeds	Cost	Expenses

- _____ Stocks, bonds, trust units Transaction summary or statements from broker
- _____ Real estate and other properties Sale documents, details of purchases
- _____ Small business corporation shares Full details
- _____ Qualified farm property Full details
- _____ Capital gains schedule Full details
- _____ Any properties gifted to others Full details
- _____ Elections in prior years Full details
- _____ Prior year reserves Full details

11. Investment Expenses

- _____ Borrow money to earn investment income Record of amounts paid
- _____ Borrow on margin account (stocks) Records from broker
- _____ Investment counsel/management fees Records from broker
- _____ Safety deposit box Record of amounts paid
- _____ Accounting fees Record of amounts paid
- _____ Borrow money to acquire tax shelter, limited partnership Record of amounts paid

12. Rental Income - See Rental Schedule

(x) If Applicable to you Provide

13. Other Income

_____ Employment Insurance Benefits	T4E slip
_____ WCB benefit/Social assistance payments	T5007 slip
_____ Universal Child Care Benefit	RC62
_____ Support payments received	Full details
_____ Scholarships, bursaries	T4A slip
_____ Income payment from an RESP	T4A slip
_____ Registered Disability Savings Plan income	T4A slip
_____ Advance payment from WITB	RC210
_____ Other	Full details

14. Other Deductions & Credits

_____ RRSP deduction	Official tax receipts
_____ Child care expenses	Details of payments
_____ Tuition fees over \$100 paid (post-secondary)	Official tax receipts
_____ Self or dependant attend post-secondary college; university	T2202/TL11; if it is transfer from dependant, please have dependant sign the back of T2202
_____ Interest paid on your student loans	Official tax receipts
_____ Loss on shares of or loss on loans to a private company	Full details
_____ Support payments paid	Record of payment & details
_____ Children's fitness amounts	Appropriate documentation
_____ Public transit amount for self or dependants (under age 19), U Pass	Public transit passes, U Pass receipts
_____ Medical expenses	Receipts, private insurance statements
_____ Donations to registered charities	Official tax receipts
_____ Benefit repayments	Official tax receipts
_____ Political contributions	Official tax receipts
_____ Disability amount for self or dependant	T2201 (first year)
_____ Required attendant to earn income	Full details
_____ Maintain a dwelling with a relative who has low income and mentally/physically impaired	Full details
_____ Northern residents	Full details
_____ Oil & Gas, Mining investments	Full details
_____ Adoption expenses	Full details
_____ First time home buyers	Full Details
_____ Tradespersons' tool deduction	Full Details
_____ Apprentice Mechanics' tools deduction	Full Details
_____ Other	Full Details

15. Prior Year Tax Return Information/Correspondence

Attach a copy of last year's Notice of Assessment.

Other than the Notice of Assessment for your tax return, did you received any other correspondence from the Canada Revenue Agency?