

# Personal Tax Checklist

Please fill out and hand in with your personal tax information

Primary Contact Information				
Name				
Address				
Phone Number				
Cell Number				
Email Address				
SIN				
Date of Birth				
Spouse Information				
Name				
SIN				
Date of Birth				
	Dependant #1	Dependant #2	Dependant #3	Dependant #4
Name				
SIN				
Date of Birth				
Below is a list of questions that are needed in order to complete your tax return. Please review the list of questions and answer accordingly.				
Did you sell your principal residence this year? If yes, we need the sale documents and the year of purchase				
Did your marital status change this year? If yes, what was the date?				
Any new dependants this year? If yes, please include information above				
Are you a caregiver for your parents and do they reside with you?				
Do you own any foreign property (ie. Land, Buildings, Shares)?				
Did you sell any foreign property this year? If yes, we need the purchase and sale documents of disposed property				
Did you make any tax installments this year?				
Did you work from home due to Co-vid for at least four consecutive weeks?				

**Below is a list of information that is commonly needed to calculate total income for tax preparation, please review and ensure to include those that are applicable to your specific situation**

Employment/Work	Investments
T4, T4A, T4E	T5, T3
Retirement	Other Common Slips
T4A(P), T4A(OAS), T4RIF, T4RSP	T5007, T2202, T5013, T5018

- Investments Gains & losses statements
- Rental Property Information, including total income and expenses, mortgage interest, property taxes
- Business Information, including total income and expenses and documentation for any capital asset purchases and sales, inventory values
- Farming Information, including total income and expenses, inventory amounts (if applicable) and AgriStability/AgriInvest information (if applicable)

**Below is a list of common deductions. Please review and ensure to include those that are applicable to your specific situation**

- RSP Contribution Slips
- Medical Expenses (including medical travel) and a detailed print out of prescription from each pharmacy
- Charity and Political Donations
- Northern Residence Travel (must have box 32 is filled out on T4)
- Employment Expenses (must have received T2200 from employer) including mileage log, purchase and sale documents of vehicles
- Student loan interest
- Spousal and Child Support Payments including agreement if new
- Moving Expenses including old and new address
- Child Care Expenses including social insurance number of individual
- Receipts for professional and/or union dues paid

**Notes/Additional Information**

If you have any questions, contact our office at 250 782 2840