

Personal Tax Checklist



Basic Personal Information	
1. Full Name	5. Phone #
2. DOB	6. Email Address
3. Current Address	7. Marital Status for tax year
4. SIN	8. Are you a Canadian Citizen
9. If you sold your home/principal residence, please provide the year of acquisition, proceeds from sale and % of ownership	
Family Information	
If married or common-law, please provide spouse's info:	
1. Full Name	5. Taxable income for tax year if we are not preparing their return
2. DOB	6. If we are preparing their return, please see below what tax documents to provide for them (as applicable)
3. SIN	
4. Are they a Canadian Citizen	
If you have children or dependents, please provide their info:	
1. Full name(s)	2. DOB(s)
Tax Income Information Required	
1. T Slips (T3, T4, T4A, T4A(P), T4A(OAS), T4RSP, T5, T5008, T2202/Tuition slips, etc.)	
2. If you have a rental property/rental income, please provide the following for each property: <ul style="list-style-type: none"> • Addresses of rental property • % of ownership (if owned with another person, please provide their full name and address) • For the rental income/expenses, please provide a summary of the following: <ul style="list-style-type: none"> ○ Rental income for the tax year ○ A breakdown of rental expenses for the tax year, such as Mortgage interest paid (not principal), Property taxes, Home insurance, Utilities, Property management fees, Condo fees, Repairs & maintenance etc. 	
3. If you have investment income, please provide the T Slips associated and the capital gain/loss summary for the tax year	
4. If you have any self-employed income, please provide see our Self-employed Checklist	
Tax Deductions/Credits Information Required	
1. If you have RRSPs, please provide the contribution slips	
2. If you have medical expenses, please provide copies of the receipts	
3. If you have donations, please provide copies of the receipts	
4. If you have employment expenses, please provide the signed T2200 – Declaration of Employment and summary/receipts for the employment expenses	
5. If you have children or dependents, please provide the childcare expenses for each child	
6. If you have student loans, please provide the interest paid for the tax year	
7. If you are a post-secondary student, please provide the T2200 from your school	
8. If you have investments, please provide the carrying charges/interest paid for the tax year	
9. If you moved for work or school and more than 40 KMs, please provide: <ul style="list-style-type: none"> • Your old address and new address • Details of purpose of the move • Summary of moving expenses 	
10. If you have professional dues or union fees, please provide the amount paid for the tax year	