

Personal Income Tax Checklist

PERSONAL INFORMATION

NAME	DATE OF BIRTH (MM/DD/YYYY)	SIN #
ADDRESS		PHONE #
CITY	PROVINCE	POSTAL CODE
EMAIL ADDRESS	MARITAL STATUS	CITIZENSHIP

SPOUSAL INFORMATION (if applicable)

NAME	DATE OF BIRTH (MM/DD/YYYY)	SIN #
ADDRESS		PHONE #
CITY	PROVINCE	POSTAL CODE
EMAIL ADDRESS	MARITAL STATUS	CITIZENSHIP

DEPENDANT #1

NAME	DATE OF BIRTH (MM/DD/YYYY)	SIN #
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DEPENDANT #2

NAME	DATE OF BIRTH (MM/DD/YYYY)	SIN #
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DEPENDANT #3

NAME	DATE OF BIRTH (MM/DD/YYYY)	SIN #
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DEPENDANT #4

NAME	DATE OF BIRTH (MM/DD/YYYY)	SIN #
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- Did you own specified **foreign property** at any time during the year with a cost of more than **\$100,000 CDN**?
Please provide: a description of the property, related country, maximum cost in the year, cost at the end of the year, income and capital gain/loss for each property
- Did you dispose of a property during the year for which you are claiming a **principal residence** exemption?
Please provide: proceeds of disposition, year the property was acquired, and a description of the property
- Do you authorize CRA to give your name, address, date of birth and citizenship to **Elections Canada**?

INFORMATION SLIPS

- T4 - EMPLOYMENT INCOME
- T4E - EMPLOYMENT INSURANCE BENEFITS
- T3, T5 - INTEREST, DIVIDENDS, MUTUAL FUNDS
- T2202A/TL11 - TUITION/EDUCATION SLIPS
- T4A(OAS), T4AP - OLD AGE SECURITY AND CPP BENEFITS
- T4A - OTHER PENSION AND ANNUITIES
- T5007 - SOCIAL ASSISTANCE PAYMENTS & WORKER'S COMPENSATION BENEFITS
- T5013 - STATEMENT OF PARTNERSHIP INCOME
- OTHER INFORMATION: _____

DETAILS OF INCOME (NO T-SLIP)

- | | |
|---|---|
| <input type="checkbox"/> BUSINESS/FARM INCOME | <input type="checkbox"/> OTHER EMPLOYMENT (i.e. tips) |
| <input type="checkbox"/> PROFESSIONAL INCOME | <input type="checkbox"/> ALIMONY, SEPARATION ALLOWANCES |
| <input type="checkbox"/> PARTNERSHIP INCOME | <input type="checkbox"/> INTEREST INCOME |
| <input type="checkbox"/> RENTAL INCOME | <input type="checkbox"/> OTHER INCOME: _____ |

DETAILS OF INVESTMENTS

- REALIZED CAPITAL GAINS/LOSSES
- REAL ESTATE INVESTMENTS
- OTHER INVESTMENTS: _____

DETAILS OF OTHER EXPENSES

- T2200 - DECLARATION OF CONDITIONS OF EMPLOYMENT
- BUSINESS, PROFESSIONAL, RENTAL EXPENSES (including capital purchases)
- HOME OFFICE EXPENSES

DETAILS OF OTHER DEDUCTIONS & TAX CREDITS

- | | |
|--|--|
| <input type="checkbox"/> CHILD CARE EXPENSES | <input type="checkbox"/> RRSP CONTRIBUTIONS/WITHDRAWALS |
| <input type="checkbox"/> MOVING EXPENSES | <input type="checkbox"/> INTEREST PAID ON STUDENT LOANS |
| <input type="checkbox"/> MEDICAL EXPENSES | <input type="checkbox"/> TOOLS ACQUIRED BY TRADESPERSONS/ELIGIBLE APPRENTICE MECHANICS |
| <input type="checkbox"/> CHARITABLE DONATIONS | <input type="checkbox"/> ELIGIBLE EDUCATOR SCHOOL SUPPLY TAX CREDIT |
| <input type="checkbox"/> POLITICAL CONTRIBUTIONS | <input type="checkbox"/> CARRYING CHARGES AND INTEREST EXPENSES |
| <input type="checkbox"/> DISABILITY TAX CREDIT | <input type="checkbox"/> OTHER: _____ |

OTHER:

- Are you a **first-time home buyer**? A federal tax credit of \$5,000 may be available.
- Did you spend more than 200 hours acting as a **volunteer firefighter** or a **search and rescue volunteer**?