



Marina Lebedev, B. Acc., CA

CHARTERED ACCOUNTANT

Personal Income Tax Checklist

This checklist is provided to assist you in assembling information necessary to prepare your tax return. Please complete the checklist as applicable and enclose additional information and supporting documentation to ensure the accurate preparation of your tax return.

PERSONAL INFORMATION

	YOU	SPOUSE
Name:		
Date of birth:		
SIN:		
Marital status and the date of change:		
Address:		
E-mail address:		
Phone numbers:	Home/Cell:	Home/Cell:
	Work:	Work:

Children (under 18) and other dependents (if applicable)

NAME	DATE OF BIRTH	SIN

GENERAL INFORMATION

Are you a Canadian citizen:	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you wish to register with Elections Canada:	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you own more than \$100,000 in foreign property:	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If eligible, can we file you T1 electronically:	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Who should we contact with questions about you tax return?

Is there a date after which you will not be able to sign you tax return? _____

Please include your most recent Notice of Assessment/Reassessment and Tax Installment Summary.

If new client, please bring a copy of your previous tax return and any carry forward details such as donations, losses, unused tuition credits, RRSP contributions, capital gain exemptions claimed, etc.

If you spouse's return is prepared by others, provide a copy of the return.

INCOME

Source of Income	Slip	Received
Employment Income	T4	<input type="checkbox"/>
Old Age Security	T4A (OAS)	<input type="checkbox"/>
CPP	T4A (P)	<input type="checkbox"/>
Other pensions & scholarship income	T4A	<input type="checkbox"/>
Employment Insurance	T4E	<input type="checkbox"/>
RRSP income	T4RSP	<input type="checkbox"/>
RRIF income	T4RIF	<input type="checkbox"/>
Dividends / Interest	T5	<input type="checkbox"/>
Mutual funds, trust and estate income	T3	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>
Universal Child Care benefit	RC62	<input type="checkbox"/>
Social assistance payments (income assistance, worker compensation payments received)	T5007	<input type="checkbox"/>
Income from sources outside Canada		<input type="checkbox"/>
Other		<input type="checkbox"/>

FALURE TO REPORT ALL T-SLIP INCOME MAY RESULT IN ADDITIONAL TAX PENALTY AND INTEREST

Other Sources of Income:

Capital gains and losses	Details of all investment/capital asset disposals during the year including information to support original purchase price
Rental	<ul style="list-style-type: none"> • Address and number of rental units • Revenue and expenses • Percentage of personal use • If purchased or sold during the year, provide statement of adjustments, purchase/sale agreement and allocation of value between land and building.
Self-employment income	<ul style="list-style-type: none"> • Address and nature of business • Business structure (proprietorship or partnership, names and share of other partners) • Revenue and HST return for the year • Itemized business expenses (pay special attention to meals and entertainment) • Auto expenses (purchase/sale price if bought during the year, gas, repairs, loan interest, lease costs, parking and toll roads, percentage used for business) • Home office expenses (percentage used for business, mortgage interest, rent, property taxes, utility bills, insurance, maintenance and repair) • Details of capital assets acquired/disposed of during the year
Support payments received	Alimony/Spousal support

DEDUCTIONS AND TAX CREDITS

	Amount	Receipts/Slips (if applicable)
RRSP contributions		<input type="checkbox"/>
Union and professional dues		<input type="checkbox"/>
Child care expenses (incl. SIN and name of caregiver)		<input type="checkbox"/>
Child fitness amounts (for children under 16, max \$500 per child)		<input type="checkbox"/>
Child art amount (for children under 16, max \$500 per child)		<input type="checkbox"/>
Alimony/support payments (incl. copy of agreement)		<input type="checkbox"/>
Rent or property taxes paid		<input type="checkbox"/>
Monthly transit passes		<input type="checkbox"/>
Moving expenses (contact us for detailed list)		<input type="checkbox"/>

Personal Income Tax Checklist

4

Medical/dental/attendant care expenses		<input type="checkbox"/>
Charitable/political donations		<input type="checkbox"/>
Employment expenses (travel, home office, etc., incl. T2200 signed by employer)		<input type="checkbox"/>
Tools acquired by apprentice vehicle mechanic (max \$500)		<input type="checkbox"/>
Tuition fees (incl. dependent's income if transferring)		<input type="checkbox"/>
Interest paid on a student loan		<input type="checkbox"/>
Accounting fees		<input type="checkbox"/>
Investment counsel fees		<input type="checkbox"/>
Legal fees to collect salary, alimony, support		<input type="checkbox"/>
Investment/business interest expense		<input type="checkbox"/>
Safety deposit box rental		<input type="checkbox"/>
Other		<input type="checkbox"/>

Include disability credit form T2201 for first time claims for self and dependents.

DEADLINES

Jan 30	Interest payment on related party interest free or low-interest loans
Feb 29	Filing of T4, T4A and T5 slips and summaries
Feb 29	RRSP contributions including annual repayment of RRSP Home Buyer withdrawals
Mar 15	First personal tax installment
Mar 30	T3 slips and T3 returns for calendar year end trusts
Apr 30	T1 personal income tax return (if not self-employed) and payment of outstanding tax balance (whether self-employed or not)
Jun 15	T1 personal income tax return for self-employed individuals
Jun 15	Second personal tax installment
Sept 15	Third personal tax installment
Dec 15	Forth personal tax installment

If you have any questions regarding this checklist, please do not hesitate to contact us
Tel: (905) 401-2167 Fax: (647) 436-6320 E-mail: mlebedev@mlaccounting.ca