

# Income Tax Return Organizer Checklist for Individuals

## Personal Information

Name _____		Spouse (if applicable) _____	
Address _____		Address (if Different) _____	
Home Phone _____	Work Phone _____	Home Phone _____	Work Phone _____
Email _____		Email _____	
Date of Birth _____	Citizenship _____	Date of Birth _____	Citizenship _____

- If we did not prepare your return last year, please ensure we have a copy of your previous year return.
- If we are not preparing your spouse's return and it will be filed separately, please enclose a copy of the current year return.

## Important Questions

- 1) Has your marital status changed since we last did your taxes?  Yes  No \_\_\_\_\_
- 2) Did you or your spouse make tax installments for the current tax year?  Yes  No (If yes, please provide us with interim statements)
- 3) Has your Direct Deposit information changed or do you wish to start Direct Deposit? If so, please attach a void cheque with your banking information. \_\_\_\_\_
- 4) If you are claiming any dependents, please provide name(s), date of birth(s) (attach a separate sheet if space is not sufficient) \_\_\_\_\_
- 5) Do you wish to pension split with your Spouse?  Yes  No If yes, both need to initial: \_\_\_\_\_
- 6) Please provide full information on any new dependents whose income tax return my office will be completing; (provide personal information above and also include SIN ) \_\_\_\_\_
- 7) Did you pay property tax or rent during the tax year?  Yes  No If yes,  Property Tax or  Rent **Total Amount paid** was \$ \_\_\_\_\_ and was paid to: \_\_\_\_\_
- 8) Do you elect to have CRA forward certain information to Elections Canada?  Yes  No
- 9) Are you, your spouse or your dependent eligible for a Disability Credit?  Yes  No If yes, Form T2201 must be submitted for CRA approval. CRA will notify you when you and your doctor need to update the form.

**Foreign Property, Interest in a Foreign Trust, Foreign Investments with a Canadian Broker -at any time in the tax year- with a total cost of more than \$100,000.00(Cdn).**

**YES, I/WE HELD OR OWNED FOREIGN PROPERTY COSTING MORE THAN \$100,000.00** \_\_\_\_\_  
Initials of Self (& Spouse if applicable)

**NO, I/WE DID NOT HOLD OR OWN FOREIGN PROPERTY COSTING MORE THAN \$100,000.00** \_\_\_\_\_  
Initials of Self (& Spouse if applicable)

**Number of Days spent in the U.S. over the past three years?** \_\_\_\_\_

If you do not have sufficient space to write your answers, please attach a separate page.

## Details of Income and Expenses

Please check if applicable

### INCOME

	<b>Self</b>	<b>Spouse</b>	<b>If yes, provide the supporting information</b>
Business or Partnership Income	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Canada (or Quebec) Pension Plan	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4A (P)
Canada Revenue Agency Refund Interest	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Tax Assessment Notice 2009
Capital Gains (Losses)	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Child Support Payments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Dividend Income	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T5, T4PS, T5013 and/or T5013A
E.I. Income	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4E
Employment Income (Salary)	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4, T4A
Foreign Pensions	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Guaranteed Income Supplements, Social Assistance, Worker's Compensation Payments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T5007/ Provide Details
Interest and/or Dividend Income	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T3/T5/ Provide Details
Old Age Security	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4A(OAS)
Other Income not reported elsewhere	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Other Pension or Superannuation	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4A
Rental Income	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details of income & expenses
RRSP Income	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4RSP
Spousal Support Payments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Universal Child Care Benefit (UCCB)	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	RC62

### EXPENSES

Accounting or Investments Fees	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Allowable Business Losses	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Attendant Care Expenses	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Charitable Donations	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Child Care Expenses	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Child Arts or Fitness Amounts	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Employment Expenses including GST/HST portion, i.e., car, office at home, etc.	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts/Form T2200/Form GST370
Interest Expense on monies borrowed to earn investment income or on <b>Student Loans</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Management Fees, Safety Deposit Box, etc.	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Medical Expenses (incl. insurance premiums)	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Moving Expenses	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Pension Contributions	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4/T4A
Political Donations	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Public Transit Passes	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts or passes
RRSP Contributions	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
RRSP Homebuyer/Lifelong Learning Plan	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T1137
Withdrawal or Repayment Information	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Provide Details
Spousal Support Payments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Reports/Receipts
Tax Shelter Investments	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts
Tradespersons – Eligible Tool Expense	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Receipts/Form T2202
Tuition Fees (self, spouse, dependents)	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	T4 or Receipts
Union or Professional Dues	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Details
Other	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	

**Please attach a separate page if more space is required.**