

Personal Tax Checklist

For tax year: 2011

Kindly review the list and ensure that you provide us with all of the relevant necessary information so that we can minimize your personal income taxes for the year.

Name:	Spouse's name:
Address:	Spouse's Birthdate:
Postal Code:	Spouse's Social Insurance Number:
Telephone:	Marital Status(date):
Email address:	
Children's name(s), birthdates and income	

Information slips for the following income:

- Employment (T4)
- Pension (T4A)
- E.I. (T4EI)
- Dividends (T5)
- RRSP, DPSP, RPP, RRIF (T4RRSP, T4RRIF)
- Estates/trusts/mutual funds (T3)
- Pensions T4A(OAS), T4A(P)
- Other

Documents for the following transactions:

- CRA's Notice of Assessment for the prior year's return
- Lawyer's statement of adjustment regarding sale of real estate property
- Sale of shares/stocks/bonds/commodities
- Tax shelters
- RRSP/Home Buyers Plan
- Other

Receipts for the following deductions:

- RRSP contributions
- Union/professional dues
- Childcare expenses (include names, addresses & SIN of caregivers)
- Attendant care expenses paid
- Accounting fees
- Safety deposit box rent
- Interest paid on loans for business, investments(excluding RRSP's), or student loans
- Investment counselor fees
- Tuition education fees (T2202, signed by student)
- Medical expenses
- Moving expenses
- Charitable donations
- Political donations

Provide details of:

- Alimony/maintenance paid or received
- Benefits not recorded on T4s
- Spouse's income if we are not preparing the spouse's return
- Dependents not listed on your prior year's return
- Information regarding foreign investments
- Self employed & rental property revenues & expense
- Income tax installments paid for the year
- Rental income and expense schedule
- Self-employment income/expense schedule
- Farming income/expense schedule
- Automobile expenses if eligible
- Home office expenses if eligible
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