

2009 Personal tax checklist

Name: _____

<i>Income</i>	<i>Type of slip</i>
<input type="checkbox"/> Salaries, wages, employment income	<input type="checkbox"/> T4, <input type="checkbox"/> T4A
<input type="checkbox"/> Pension income, OAS, CPP, RRSP, RIF, <input type="checkbox"/> Foreign pension income	<input type="checkbox"/> T4A, <input type="checkbox"/> T4A(P), <input type="checkbox"/> T4A(OAS), <input type="checkbox"/> T4(RIF)
<input type="checkbox"/> Interest, dividends, foreign investment, trust income, mutual funds, etc.	<input type="checkbox"/> T5, <input type="checkbox"/> T3, <input type="checkbox"/> T4(PS), <input type="checkbox"/> T5008, <input type="checkbox"/> manual lists
<input type="checkbox"/> EI Benefits	<input type="checkbox"/> T4(U)
<input type="checkbox"/> Rental Income	<input type="checkbox"/> See separate checklist for rental properties, <input type="checkbox"/> T5013
<input type="checkbox"/> Capital Gains/losses	<input type="checkbox"/> Buy/sell slips, <input type="checkbox"/> brokers statements, <input type="checkbox"/> T5008
<input type="checkbox"/> Alimony, <input type="checkbox"/> child support	<input type="checkbox"/> Amount, <input type="checkbox"/> Pursuant to written separation agreement
<input type="checkbox"/> RRSP income/withdrawals	<input type="checkbox"/> T4(RSP)
<input type="checkbox"/> Other income (IAAC income, bursaries, retiring allowances)	<input type="checkbox"/> T4(A) <input type="checkbox"/> Listing
<input type="checkbox"/> Income from self employment – sole proprietor/partnership/commissions	<input type="checkbox"/> T5013 <input type="checkbox"/> Financial statements <input type="checkbox"/> See separate checklist for summary of Revenues and expenses
<input type="checkbox"/> Universal child care benefit	<input type="checkbox"/> RC62
<input type="checkbox"/> Social assistance – WSIB, Supplements	<input type="checkbox"/> T5007, <input type="checkbox"/> T4A(OAS)

<i>Deductions</i>	<i>Type of slip/backup</i>
<input type="checkbox"/> RRSP contributions/ <input type="checkbox"/> RSP/ <input type="checkbox"/> pension adj. <input type="checkbox"/> Pension adjustment reversal	<input type="checkbox"/> RRSP , <input type="checkbox"/> T4 <input type="checkbox"/> T10
<input type="checkbox"/> Union dues, <input type="checkbox"/> mandatory professional dues	<input type="checkbox"/> T4 , <input type="checkbox"/> receipt
<input type="checkbox"/> Child care expenses	<input type="checkbox"/> receipts, <input type="checkbox"/> Name, SIN, T4 provided to caregiver
<input type="checkbox"/> Moving expenses	<input type="checkbox"/> T1M (see CRA website or request information from us) <input type="checkbox"/> Listing of expenses
<input type="checkbox"/> Carrying charges, interest on money borrowed to invest <input type="checkbox"/> safety deposit box rental <input type="checkbox"/> investment counsel fees	<input type="checkbox"/> statement from bank <input type="checkbox"/> receipt
<input type="checkbox"/> Employment expenses	<input type="checkbox"/> T2200 signed by employer, <input type="checkbox"/> listing of expenses
<input type="checkbox"/> Alimony, <input type="checkbox"/> child support paid	<input type="checkbox"/> Amount,
<i>Tax Credits</i>	<i>Type of slip/backup</i>
<input type="checkbox"/> Amount for children born after 1991 (claimable by one spouse only)	<input type="checkbox"/> # of children to claim
<input type="checkbox"/> Public transit tax credit	<input type="checkbox"/> provide transit passes
<input type="checkbox"/> Children fitness tax credit	<input type="checkbox"/> provide receipts, must be for a program more than 8 weeks
<input type="checkbox"/> Tuition (Post secondary)	<input type="checkbox"/> T2202A, if transferred from a child, please Ensure they sign the back of the form
<input type="checkbox"/> Interest on student loans	<input type="checkbox"/> receipts
<input type="checkbox"/> Medical expenses	<input type="checkbox"/> receipts
<input type="checkbox"/> Donations	<input type="checkbox"/> official receipts
<input type="checkbox"/> Home or cottage renovations	<input type="checkbox"/> receipts

Other Deductions & Credits	Documentation required
<input type="checkbox"/> Ontario tax credit – property taxes or rent	<input type="checkbox"/> provide property taxes or rent (including Landlord, address, and rent in the year) <i>Note this is for low income taxpayers only.</i>
<input type="checkbox"/> Income taxes paid by installments	<input type="checkbox"/> Provide statement from CRA

Other information	Documentation
Did your marital status change in the year? If so, please provide:	<ul style="list-style-type: none"> • Date of change • Your spouse’s SIN • Your spouse’s Name • Your spouse’s date of birth
Are you living in a common law relationship? If so, please provide:	<ul style="list-style-type: none"> • Date of union • Your partner’s SIN • His/her name • His/her date of birth
Were any children born to you during the year? If so, please provide:	<ul style="list-style-type: none"> • Childs SIN (if applicable) • Name • Date of birth
Did any of your dependants earn income in the year?	Consider preparing a tax return for them?
Did you support any other dependants during the year?	Provide details.
Were you or a dependent blind or severely impaired during the year?	Please have your Doctor complete a T2201
Are you a Canadian citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you own or hold foreign property at any Time in the year with a total cost of more than \$100,000 Cdn?	Provide details
Do you want to e-file? (recommended as CRA Will make this mandatory in 2011)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please include a copy of your 2008 Notice of Assessment for our files/review	<input type="checkbox"/> Yes <input type="checkbox"/> No
If we believe it is tax effective to pension Income split with your spouse, do you Authorize us to do this?	<input type="checkbox"/> Yes <input type="checkbox"/> No