

PERSONAL TAX CHECKLIST

In order for us to prepare your tax return on a timely basis, please bring in as much complete information as possible when dropping off your package.

Please include your Notice of Assessment for 2007 (sent to you from CRA) and any other CRA correspondence.

Client name: _____

Telephone(____) _____ Fax (____) _____ E-mail _____

Address change: indicate only if changed from previous return filed _____

Marital Status: Indicate only if changed. YES _____ Date of Change _____

SIN (new clients only): _____ Birthdate (new clients only): _____

Income:

- Employment – T4 (Issue deadline is February 28)
- Employment Insurance – T4E
- Old Age security – T4A (OAS)
- Other Pensions – T4A Consider pension income splitting? Y____ N ____
- Canada Pension Plan benefits – T4A(P)
- RRSP's – attach T4RSP, T4RIF - attach spouses info if income splitting pensions
- Mutual Funds and other Trust Income—T3 (Issue deadline is March 31)
- Interest – Bank, Trust, Bonds – T3/T5/T600
- Dividends – T5/T600 (Issue deadline is February 28)
- WCB—T5008
- Business/Professional/Partnership/Director Fees – Financial Statements or T5013 or a summarized list of income
- Rental Property (attach details of income, expenses, purchases and sales)
- Capital Gains/Losses. Did you dispose of any capital properties this year? (attach copies of sales detail, original purchase documentation and 1994 capital gains election made)
- Spousal support -provide copy of post April 30, 1997 agreement(s) or election, if changed or not previously provided; or court order
- Foreign pension amounts in Canadian dollars
- RC62 Universal Child Care Benefits
- Other income (e.g., stock options, annuities, scholarships, fellowships, bursaries, research grants, T4PS, T5018 and any other “T “ slips that you may have received)

Deductions:

- Declarations of Conditions of Employment (detail and attach form T2200 signed by your employer)
- If your employer required you to have a home office, a vehicle, a cell phone, or other expenses which you were not reimbursed for, you may be eligible to deduct some of these expenses. Apprentices may claim certain tool expenses.
- Allowable business investment losses (refer to Capital Gains/Losses above)
- Sole Proprietor Business expenses
 - Automobile expenses including business mileage and total mileage, new purchase or lease, gas, regular repairs & maintenance, insurance, parking relating to business
 - Home office expenses including phone, hydro, gas, property taxes and utilities (if you own the home), rent, insurance, office supplies, repairs & maintenance, mortgage interest
 - Office square footage and total square footage and the number of rooms in the home

Deductions - cont'd

- Any new assets purchased for the business
- Copy of GST return for 2008 if already filed and applicable
- Advertising
- Child Care expenses (attach receipts)
- For individual child care providers - Include S.I.N. and address
- For summer camps - Indicate number of weeks that child was in residence
- For Child Fitness tax credit (for dependents 17 years of age at the end of the year or 19 years of age if eligible for the disability credit)
- Other receipts for child care (e.g. Preschool,)
- Details regarding in home care for dependent relatives (attach receipts)
- Disability deduction for you or dependant (if first time claim, attach T2201 completed by your physician). Disability supports expenses (speech, sight, hearing, etc)
- Registered Retirement Savings Plan contributions (attach receipts)
- Annual union, professional dues (attach receipts)
- Moving expenses (MUST attach receipts), Indicate distance moved to new employment, include cost of maintaining a vacant former residence
- Federal and provincial political contributions (attach receipts)
- Spousal support or separation allowances paid - include name(s) and address(es) of recipient(s); attach a copy of the agreement or court order for spousal support which was signed on or after May 1, 1997 or election, if changed or not previously provided
- Carrying charges (interest on money borrowed to earn dividends and interest, investment counseling fees, interest for limited partnerships, safety deposit box, investment counsel fees)
- Other deductions and expenses (attach receipts) (e.g. public transit)
- Charitable donations (attach receipts)
- Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling. For dependents over 18 years of age, up to \$10,000 can be transferred.
- Tuition fees for yourself or a dependent- attach a **completed (signed, dated, etc)** T2202/T2202A. This form can be obtained by going on the education institution's web site, signing in with their student ID and printing the form.
- Labor-sponsored funds – T5006
- Details of accounting fees
- Details of lump sum pension plan contributions and T10 forms
- For wholly-dependent persons, please attach list and indicate for each dependant: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any.
- Adoption expenses
- Film & video production eligible for tax credit, tax shelter credits, mining tax credit expenses, business R&D
- Clergy residence deduction info, T1223

Other deductions:

- 2008 installment amount(s), attach February 2009 notice. Total remitted: \$ _____
- Attach details of RRSP – Home Buyers' Plan or Lifelong Learning Plan withdrawals and/or Canada Revenue's Statement of Account – Home Buyer's Plan, if received
- Amount of any distributions or loans from foreign trusts received in 2008
- Details of previous capital gains exemptions claimed, business investment losses and cumulative net investment loss accounts
- Details regarding residence in a prescribed area which qualifies for the Isolated Area Deduction
- Details of carry forwards from previous years including losses, donations, forward averaging amounts, registered retirement savings plans contributions not previously claimed
- Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000
- Details of any new dependants

Are we filing a return for any or your children? Please circle one: Yes or No