

Tax Return Checklist

Client Information		Spouse Information
	Name:	
	Birthday: MM/DD/YYYY	
	SIN#	
	Address	Same
	City/Prov/Postal Code	Same
	Home Phone:	Same
	Mobile Phone	
	Email	
	Marital Status	
N/A	Spouse's Net Income (If not filing together)	

Dependant Information (Child or live-in dependants over 65):

1. Name:	Birthday	MM/DD/YYYY	___/___/____
2. Name:	Birthday	MM/DD/YYYY	___/___/____
3. Name:	Birthday	MM/DD/YYYY	___/___/____
4. Name:	Birthday	MM/DD/YYYY	___/___/____

Slips	N/A	Pending	Complete	Notes
1. T4 slips (Employment income)				
2. Employment Insurance Benefits(T4E)				
3. Interest, dividends, mutual funds (T3,T5,T5008)				Please make sure there are values in <u>T5008 box 20</u> , otherwise please bring in the monthly trading activities statements that record the purchase of the shares sold in 2016 (may need statements for prior years) or request one from your financial advisor for the <u>Book Value Cost</u> .
3. Tuition/Education (T2202A)				
4. Universal Child Care Benefit (RC62)				
5. Old Age Security & CPP Benefits (T4A-OAS, T4AP)				
6. Other Pensions and annuities (T4A)				
7. Social Assistance payments (T5007)				
8. Workers' Compensation Benefits (T5007)				
9. All other Information Slips				

Receipts	N/A	Pending	Complete	Notes
1. RRSP Contribution				
2. Political Contributions				
3. Charitable donations				
4. Professional or union dues				
5. Tool expenses (Tradespersons & Apprentice mechanics)				
6. Medical expenses				
7. Transit pass receipts				

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8. Support for a child, spouse or common-law partner				
9. Child Care expenses				
10. Adoption expenses				
11. Interest Paid on Student Loans				
12. Exams for professional certification				
13. Moving Expenses				
14. Carrying Charges & Interest expenses				
15. Teaching supplies				
16. Student loan interest Federal and Provincial				

Other Documentation	N/A	Pending	Complete	Notes
Notice of Assessment/Reassessment				
Canada Revenue Agency Correspondence				
Sale or deemed sale of stock, bonds, or real estate(including your principal home)				
Birth/ Death Certificate				
Marriage Certificate/Separation Agreement/Divorce Court Order				
Are you qualified for Disability Tax Credit?				
**Rental Income and Expenses	**Please see check list for Rental Income			
**Business, Farm or fishing income/expenses	**Please see check list for Self-Employed Business			
**Automobile/Travel logbook and expenses	**Please see check list for Mileage Log			
**Declaration of Conditions of Employment (T2200)	**Please see check list for Employment Expenses			
**Foreign Property total over \$100,000?				

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 NO