

**2011 CANADIAN PERSONAL TAX CHECKLIST**

**Identification (for new clients only or if you have any new information for your 2011 tax return)**

Your name \_\_\_\_\_ Social Ins # \_\_\_\_\_ Birthdate \_\_\_\_\_  
 Your spouse \_\_\_\_\_ Social Ins # \_\_\_\_\_ Birthdate \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ Post Code \_\_\_\_\_  
 Home phone \_\_\_\_\_ Email \_\_\_\_\_  
 Work phone \_\_\_\_\_

**Other Information (for new clients or if you have any new information for your 2011 tax return)**

Marital Status →  Married  Widowed  Separated  Common-law  Divorced  Single

Are we preparing a tax return for your spouse?  Yes  No

If we are NOT preparing a return for your spouse, please provide the net income figure from line 236 of your spouse's tax return. Line 236 net income of spouse \$\_\_\_\_\_.

Are you a citizen of Canada?  Yes  No      Is your spouse a Canadian citizen?  Yes  No

**Other Information (existing clients should provide only new dependant information and answer questions below)**

List any dependants who were under age 18 in the year or who you financially supported during 2011:

Name	Relationship	Income	Birthdate
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Do you wish to have your tax return electronically-filed?  Yes  No  
 Although most tax returns we prepare are electronically-filed, we may, depending on the contents of your tax return, recommend that your return be paper-filed.

Do you own foreign property with a cost of more than \$100,000  Yes  No

Do you want your tax refund directly deposited to your bank account?  Yes  No

Do you wish to release your address information to Elections Canada?  Yes  No

## Income Sources and Relevant Slips

- |                                                       |          |
|-------------------------------------------------------|----------|
| <input type="checkbox"/> Employment income            | T4       |
| <input type="checkbox"/> Taxable disability income    | T4A      |
| <input type="checkbox"/> Profit sharing income        | T4PS     |
| <input type="checkbox"/> Commission income            | T4A / T4 |
| <input type="checkbox"/> Old Age Pension              | T4AO     |
| <input type="checkbox"/> Canada Pension Plan          | T4AP     |
| <input type="checkbox"/> Other pension/annuity        | T4A      |
| <input type="checkbox"/> RRSP income                  | T4RSP    |
| <input type="checkbox"/> RRIF income                  | T4RIF    |
| <input type="checkbox"/> RRSP withdrawals             | T4RSP    |
| <input type="checkbox"/> EI Benefits                  | T4E      |
| <input type="checkbox"/> WSIB                         | T5007    |
| <input type="checkbox"/> Social Assistance            | T5007    |
| <input type="checkbox"/> Dividend income              | T5       |
| <input type="checkbox"/> Interest income              | T5       |
| <input type="checkbox"/> Limited partnership          | T5013    |
| <input type="checkbox"/> Universal Child Care Benefit | RC62     |

## Other Income Sources

- |                                                       |                                                           |
|-------------------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> Rental income                | Schedule of gross rental income/expenses and personal use |
| <input type="checkbox"/> Sale of real property        | Proceeds of sale & details of adjusted cost base          |
| <input type="checkbox"/> Sale of non-RRSP investments | Proceeds of sale and details of adjusted cost base        |
| <input type="checkbox"/> Self-employed income         | Schedule of gross income & expenses                       |
| <input type="checkbox"/> Alimony income               | Total received; taxable portion; copy of agreement        |
| <input type="checkbox"/> Other income                 | Details!                                                  |

## Capital Assets Bought / Sold

Where you have rental or self-employed income, we need details of capital assets purchased or disposed of during the year.

### Business Use of Home Expenses

- |                                                |       |
|------------------------------------------------|-------|
| <input type="checkbox"/> Heat                  | _____ |
| <input type="checkbox"/> Hydro                 | _____ |
| <input type="checkbox"/> Insurance             | _____ |
| <input type="checkbox"/> Property taxes        | _____ |
| <input type="checkbox"/> Mortgage interest     | _____ |
| <input type="checkbox"/> Repairs               | _____ |
| <input type="checkbox"/> Other                 | _____ |
| <input type="checkbox"/> Business use of home% | _____ |

### Motor Vehicle Expenses

- |                                                |       |
|------------------------------------------------|-------|
| <input type="checkbox"/> Gas and Oil           | _____ |
| <input type="checkbox"/> Insurance             | _____ |
| <input type="checkbox"/> Vehicle repairs       | _____ |
| <input type="checkbox"/> License               | _____ |
| <input type="checkbox"/> Parking               | _____ |
| <input type="checkbox"/> Lease cost            | _____ |
| <input type="checkbox"/> Other costs           | _____ |
| <input type="checkbox"/> Business use of car % | _____ |
| Make & Model                                   | _____ |

**Deductions**

- Employment expenses
- Moving expenses
- Alimony payments made
- RRSP contributions
- Reg'd Pension Plan contributions
- Safety deposit box charges
- Investment counsel charges
- Investment loan interest
- Child care expenses
- Clergy residence deduction
- Union dues
- Professional association dues
- Travel expenses for employment
- Legal expenses to collect salary/wages
- Other

**Tax Credits**

- Charitable donations
- Political contributions
- Tuition fees (for yourself or dependants)
- Infirm / caregiver credit
- Public transit passes
- Children's fitness/activity credits
- Adoption expenses
- Disability credit
- Interest on student loans
- Medical expenses
- Labour sponsored funds contribution
- Property Taxes paid in 2011
- Home Buyer's Credit
- Tax instalment payments made for 2011
- Other

**Other Information You Would Like To Tell Us About ...**


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*If you're not sure we'll need it, please bring it along anyways*

**Thank You For Providing This Information!**

**Providing us with your most current information will  
allow us to provide you with the best service  
when completing your tax return.**

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