

Individual Tax Preparation Checklist

--- Personal Information ---

If any of the following information has changed (or if you are a new client) please provide the following:

Name: _____ Spouse/Partner Name: _____

Address: _____

Email Address: _____

Self: SIN: _____ Birthdate: _____

Spouse/Partner: SIN: _____ Birthdate: _____

Telephone Number: (C) _____ (H) _____

(If we are not completing your spouse/partner's return) Spouse/Partner's Net Income:

Marital Status: Married Widowed Divorced Single Separated Common-law

If marital status changed during the year, provide date of change:

Children: Name: _____ SIN (If available): _____ Date of Birth: _____

Province of Residence at December 31, 2021: _____

If you would like to use direct deposit, provide a void cheque or the following:

Branch _____ **Institution** _____ **Account number** _____

INCOME			IF YES PLEASE PROVIDE:
Salary/employment income	Yes	No	T4 slips issued by employer
Pension/annuity income/commission	Yes	No	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	Yes	No	Country, type (company/government), currency
RRSP/RRIF income	Yes	No	T4RSP / T4RIF slips
Interest/dividend/investment income	Yes	No	T5 / T5013 slips, details of other investment income
Trust/mutual fund income	Yes	No	T3 slips
Self-employment income (ie: rental, business)	Yes	No	Details of income and expenses for period. GST/HST remittance returns for period.

Capital gains/losses from sale of stocks, mutual funds, bonds, real estate, etc.	Yes	No	<ol style="list-style-type: none"> 1. Trading Summary for each brokerage account 2. Realized Gain/Loss Report 3. T5008 4. Monthly/quarterly statements showing transactions from January 1 to December 31. If you do not have statements, please provide cost and date of purchase, sale proceeds and date of sale.
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OTHER INCOME		IF YES PLEASE PROVIDE:	
Other income	Yes	No	Details or slips (Workers Compensation T5007, Employment Insurance T4E, etc.)
Sale of real estate	Yes	No	Statement of adjustments on closing from law firm and accumulated cost of property.

DEDUCTIONS AND CREDITS		IF YES PLEASE PROVIDE:	
RRSP contributions	Yes	No	Tax receipts – may include first 60 days of current year
Home Buyers Plan (HBP) or Lifelong Learning Plan (LLP)	Yes	No	Amount of any HBP or LLP repayment and statement from CRA
Union or professional dues	Yes	No	Tax receipts (if not listed on T4)
Child care/summer camp for your children	Yes	No	Official receipts
First-time home buyer tax credit	Yes	No	Date of when home was purchased
Moving expenses	Yes	No	Details – must move at least 40km closer to work
Investment income expenses	Yes	No	Interest expenses, management fees, etc.
Employment expenses	Yes	No	Details – please provide T2200
Student loan interest	Yes	No	Tax receipt – Canada Apprentice Loans are now eligible
Tuition fees for self	Yes	No	T2202/T2202A
Tuition fees of dependent who wishes to transfer	Yes	No	T2202/T2202A signed by student + copy of student's tax return if not prepared by us
Medical expenses	Yes	No	Official receipts – contact your pharmacy or insurance provider for a summary for the year. As well, please provide a summary of any travel over 40 km one-way for medical purposes.
Disability Tax Credit	Yes	No	If you feel you are eligible, have your doctor complete T2201 and send to CRA for approval.
Canada Caregiver Credit	Yes	No	If you provide care for an infirm dependent either in your home or not, provide certified letter from doctor and net income of dependent.
Charitable donations	Yes	No	Tax receipts
Political donations	Yes	No	Tax receipts
Teaching supplies	Yes	No	Receipts
Volunteer firefighter or volunteer search and rescue	Yes	No	Letter of hours volunteered



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OTHER			IF YES PLEASE PROVIDE:
Do you have assets outside of Canada, including foreign stocks in excess of \$100,000 Canadian (T1135)?	Yes	No	Details: A listing of all foreign owned assets during the year including value of assets.
Do you own a business outside of Canada (T1134)?	Yes	No	Details:
Is there more tax information which you are still waiting for?	Yes	No	Details:
Did you sell a primary residence in the tax year?	Yes	No	Details: