Personal Income Tax Checklist

Client Name: ______________________________

This checklist is designed to assist you in compiling the information necessary to prepare your personal income tax return. Please check the items that you have attached, and return this form with your documentation.

INCOME	
	T4 – Employment Income
	T4A (OAS) – Old Age Security Benefits
	T4A(P) – Canada Pension Plan Benefits
	T4A – Other Pensions, Annuities and similar income
	T4RIF – RRIF Receipts
	T4RSP – RRSP Receipts
	T5 – Interest, Dividends and other Investment Income
	T5008 – Disposition of Securities
	T3 – Mutual Funds and other Trust Income
	T5013 – Limited Partnership
	Business, Professional, or Farming financial statements or records
	Rental Property (attach summary of income, expenses, purchases, and sales)
	Disposal of any capital properties including primary residence (attach copies of sales detail and original purchase documentation)
	Spousal Support received (provide copy of agreement, if changed or not previously provided)
	Other Income (e.g. stock options, research grants and bursaries, Workers' Compensation benefits, AISH, Seniors GIS, etc.)
OTHER	
	Total instalments made during the year (attach copy of latest notice)
	Attach copy of last year's assessment notice(s)
	Attach details of RRSP Home Buyers' Plan or Lifelong Learning Plan withdrawals
	Amount of any distributions or loans from foreign trusts received during the year
	Details of foreign property, other than personal use property, if aggregate cost is in excess of $100,000 at any point in the year
	Provide copy of previous year's income tax return(s) if not prepared by Baumgartner & Company

Comments:

DEDUCTIONS	
	Registered Retirement Savings Plan contributions (attach receipts)
	Annual union, professional dues (attach receipts)
	Childcare expense (attach receipts) - For individual providers: include Social Insurance Number and address - For summer camps, indicate the number of weeks that were in-residence
	Attendant care expenses (attach receipts)
	Moving expenses (attach receipts) and indicate distance moved to new employment
	Spousal and Child support paid (include name(s) and address(es) of recipients; attach copy of agreement or court order for spousal support, if changed or not previously provided)
	Commission and employment expenses (include details and T2200 or TL2)
	Carrying charges (interest on money borrowed to earn dividend and interest, investment counsel fees, interest for limited partnerships)
	First time homebuyer (attach purchase document)
	Employed or apprenticed in the Trades (attach receipts for tools purchased for employment)
	Federal and provincial political contributions (attach receipts)
	Charitable donations (attach receipts)
	Medical expenses (attach receipts) and details of *private* health insurance premiums including travel insurance
	Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician)
	Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants)
	Interest paid on student loans (attach reporting slip)
	For wholly-dependent persons, please list and indicate for each dependant: name, address if different, relationship, birth date, Social Insurance Number, and net income. Note infirmity, if any.

Any other deductions/expenses (attach receipts and specify below):

New Clients Only: Could you please tell us why you chose Baumgartner & Company to prepare your personal income tax return? If referred, who may we thank for this referral?