

RM FINANCIAL SERVICES



PERSONAL INCOME TAX PREP CHECKLIST

PERSONAL INCOME TAX PREPARATION CLIENT CHECKLIST:

PLEASE PROVIDE THE FOLLOWING INFORMATION AND DOCUMENTS TO ASSIST IN PREPARING YOUR INCOME TAX RETURN (T1).

Client Information and Employment Income

Personal Information

- ☐ Full Legal Name
- ☐ Social Security Number
- ☐ Date of Birth
- ☐ Marital Status & Spouse's Details
- ☐ Current Address
- ☐ Phone Number & Email Address

Dependent's Information

- ☐ Full legal Name
- ☐ Social Security Number
- ☐ Date of Birth
- ☐ Childcare Expenses & Receipts
- ☐ Disability Tax Credit (If Applicable)
- ☐ Other Medical Expenses & Receipts

Employment Income and Other

- ☐ T4 Slips for All Employment Income
- ☐ Employment Expense Declaration (Form T2200)
- ☐ Union or Professional Dues Receipts
- ☐ Other Work From Home Expense Claims
- ☐ Copy of Last Year's Return
- ☐ Notice of Assessment or Reassessment

Other Income and RRSP Contributions

Pension and Retirement Income

- ☐ T4A Slips (Pensions, Annuities)
- ☐ Old Age Security (OAS) & CPP
- ☐ RRSP/RRIF Withdrawals (T4RSP, T4RIF)
- ☐ Other Retirement Income

RRSP Contributions

- ☐ RRSP Contribution Receipts
- ☐ Contributions Made In the First 60 Days Of The Following Year
- ☐ Carryforward Contribution Room From Previous Year

Investment and Savings Income

- ☐ T5 Slips (Interest/Dividends)
- ☐ T3 Slips (Trust Income)
- ☐ Capital Gains/Losses
- ☐ Foreign Investment Income

Self-Employee Business and Rental Properties

Self-Employee Business

- ☐ Revenue/Sales Summary
- ☐ Business Expenses Summary
- ☐ Vehicle Bill Of Sale & Expenses Summary
- ☐ Home Office Expenses Details

Rental Property Income

- ☐ Total Rental Income Summary
- ☐ Mortgage Interest Statements
- ☐ Property Taxes Statement
- ☐ Other Rental Property Expenses

Principal Residence and Property Information

- ☐ Percentage Of Home Portion Used For Personal and Business
- ☐ Property Tax and Rent Receipts

Tuition and Education Amounts and Other Deductions

Tuition and Education Amounts

- ☐ T2202 Tuition Slips For Self Or Dependents
- ☐ Tuition Transfer Amounts From Children (If Applicable)
- ☐ Professional Certification Not Claimed By Employer
- ☐ Interest Paid On Student Loans

Other Deductions or Credits

- ☐ Home Accesssibility Tax Credit
- ☐ First-Time Home Buyer's Credit
- ☐ Adoption Expenses

Caregiving and Medical

- ☐ Caregiver Credit (If Applicable)
- ☐ Attendant Care Expenses
- ☐ Travel Medical Insurance Premiums
- ☐ Private Insurance Premiums (Health, Dental)

Newcomers to Canada (Student, Temporary Resident or Permanent Resident)

World Income

- ☐ Total Income Earned Before Arriving to Canada
- ☐ Proof of Earnings Summary

Residency and Immigration Documentation

- ☐ Permanent Residency Card or Confirmation
- ☐ Work Or Study Permit
- ☐ Any other Residency Or Immigration Documents

Tax Credits and Benefits

- ☐ GST/HST Application
- ☐ Canada Child Benefit (CCB) application
- ☐ Provincial Credits (Ontario Trillium Benefit)
- ☐ Spouse's And Dependent's Income Details (If Applicable)

PLEASE REVIEW THE CHECKLIST CAREFULLY AND PROVIDE ALL APPLICABLE DOCUMENTS. IF YOU HAVE ANY QUESTIONS OR NEED FURTHER ASSISTANCE, PLEASE

FEEL FREE TO CONTACT US AT +1 (519) 574-4358 OR INFO@RMFINANCIALSERVICES.CA