

# Clarion Tax Services

## Personal Income Tax Information Checklist

If you answer "Yes" to any of these questions, the supporting documentation MUST BE ATTACHED to this checklist before you come to your appointment.

### A. Personal Information/Change

-Name

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-Address

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Province of residence \_ \_ \_ \_ \_

Marital Status \_\_\_\_\_

Occupation \_\_\_\_\_

B. Are you attaching a copy of your notice of assessment/reassessment from CRA from the previous year? Yes      No

### C. Income

1. Did you receive any income from employment or sundry sources such as T4 T4A slips? Yes      No

2. Did you receive any income from trusts (T3 slips)? Yes      No

3. Did you receive any investment income (T5s)? Yes      No

4. Did you earn any income from foreign sources? Yes      No

If yes please provide details of any foreign tax with-holdings.

5. Did you receive rental income? Yes      No

If yes please supply address, income, expense, percentage of ownership, property taxes

6. Did you withdraw money from your RRSP or Home Buyer Plan? Yes      No

7. Were you self employed as a sole proprietor, partnership or unincorporated

business? Yes No  
If yes please supply financial statements prepared by any firm other than ours.

8. Did you receive any of the following types of pension income Yes No  
Old Age Security (T4 OAS)  
Canada or Quebec Pension (T4AP)  
Other Pension or Annuities T4A  
RRSP Pay-out (T4RSP)  
RRIF payments(T4RIF)

9. Did you earn any other income not reported on T5s such as T bills, bank interest,  
foreign investments? Yes No

10. Did you receive the Universal Child Care Benefit (RC62) Yes No

#### D: Capital Gains/losses

Did, your spouse or dependents dispose of any of the following in the previous year?

- Shares, bonds or similar securities (T5008 and broker statements)	Yes	No
- Personal property more than \$1000	Yes	No
- Real estate	Yes	No
- Foreign property	Yes	No
- Commodity transactions	Yes	No
- Gifts or property to spouse or children	Yes	No

#### E. Deductions from Income

1. Did you make any contributions to an RRSP between March 2 and December 31?  
Yes No

2. Did you make any contributions to an RRSP between January 1 and March 1, of  
the previous year? Yes No

3. Did you incur and expenses to earn income (safety deposit box rental, interest  
expenses, investment counsel advice, etc.)? Yes No

4. Did you incur child care expenses for children under 16 years of age?  
Yes No

5. Have you invested in any limited partnerships? Yes No

6. Have you financed any partnerships with loans? Yes No

7. Are there deductions to consider which have not been included in the financial  
statements. Yes No

8. Have you incurred expenses in respect to a home office Yes    No

F. Non-refundable Tax Credits

1. Has there been any change in dependents during the last year? Yes    No

2. Did your spouse or dependents earn any income during the last year?

If yes, please provide copies of tax returns

3. Were you supporting a disabled person over the age of 18? Yes    No

4. Did you adopt a child during the past year? Yes    No

If yes, please supply details of legal and adoption fees.

5. Were you, your spouse or any of your dependents in attendance at a post-secondary institution? (Form T2202 must be supplied from Canadian institutions)

Yes    No

6. Did you pay any un-reimbursed medical fees during the last year for you, your spouse or any dependents? Yes    No

7. Did you or your spouse make any charitable donations last year? Yes    No

8. Did you pay for a monthly transit pass last year? Yes    No

Please supply copies of paid passes.

G. Other Items

1. Did you pay quarterly tax instalments last year? Yes    No

Please supply dates of payments and amounts.

2. Did you make any federal or provincial political contributions? Yes    No

3. Were you at any time living in residence at a post-secondary institution in Ontario?

Yes    No

4. Please provide details of your home:

Address \_\_\_\_\_

Number of months used as principal residence in the last year \_\_\_\_\_

Property taxes paid if owned \_\_\_\_\_ Rent paid if leased \_\_\_\_\_

Name of municipality if owned \_\_\_\_\_

Name of Landlord if leased \_\_\_\_\_

H. Foreign Income Reporting

1. Did you loan or transfer any fund or property to a non-resident in the last year?  
Yes No

2. Were you a beneficiary of a non-resident trust during the previous year? Yes No

3. Did you own foreign property last year with a total cost of more than \$100,000.00 (excluding personal use vacation property or the foreign content of a Canadian mutual fund)?  
Yes No

I. Other

1. Did you receive any tax slips or income from any source not mentioned above?  
Yes No

2. Did you receive personal labels from CRA?  
If yes, please forward to our office. Yes No

3. Did you receive any tips or gratuities? Yes No