

INCOME TAX RETURN - CHECKLIST

Personal Legal Name: _____ SIN _____

Spouse Legal Name: _____ SIN _____

Phone Number: _____ Email: _____

Dependent Name:	Relationship	Date of Birth	SIN

Marital Status:		Did you sell your principal residence in the previous year?	
Has there been a change in address?		Do/did you hold foreign property/investment?	

INCOME			
	T4: Employment		T4E: Employment Insurance Benefits
	T4A: Other pensions and annuities		T4A-OAS/T4AP: Old Age Security and CPP Benefits
	T3/T5: Interest, dividends, mutual funds, etc.		T2125: Self-Employment Income
	T5007: Social Assistance Payments		T776: Rental Property Income
	T5007: Worker's Compensation Payments		Other:

RRSP	
Contributions	Withdrawals (Choose: regular, home buyer, school)

RECEIPTS/OTHER	
Professional or Union Dues (not on a T4)	Property Taxes
T4044: Employment Expenses	Rent (Residential) Receipt
Medical Expenses (Insurance, uncovered, travel)	T2202A: Tuition/Education Receipts
Moving Expenses	Interest paid on Student Loans
Charitable Donations	Political Contributions
Child Care Expenses	Adoption Expenses
Public Transportation	Other:

OTHER DOCUMENTS	
Previous year Notice of Assessment/Reassessment	CRA communication
Sale of Stocks, Bonds, Real Estate or Principal Residence	

How would you like to complete the signing of your tax return?

- Email your returns to you with a brief explanation, you sign and return the signature page(s).
- Schedule a meeting to review entire return and sign signature page(s).

Payment is due upon signing regardless of the method you choose.

I have checked the applicable boxes and provided all information necessary to complete all required tax returns. Any sections or boxes left blank are assumed to be not applicable.

Signature: _____ Date: _____