
Personal Income Tax Return Checklist

To ensure your tax return is complete and accurate please fill out and return this checklist. When you have completed the form, click on the "save" button on the last page to save the file and return to us via email or our portal. To access our secure document transfer portal click here:

PERSONAL INFORMATION

Fields in red are required fields

Name:

SIN#:

Date of Birth:

Address:

Primary Phone:

Email:

Marital Status December 31:

Date of Change in Marital Status:

Province of Residence December 31:

Date of Change in Canadian Residency:

FILING INFORMATION

Are you a Canadian Citizen? Yes No

Did you immigrate to Canada? Yes No

If yes to previous, date of arrival:

Do you own foreign property with a total value greater than 100,000? Yes No

Are you registered for Online Mail with CRA? Yes No

If no to previous, do you wish to be registered for online mail? Yes No

Dependent Information #2

Name:

SIN:

Relationship:

Date of Birth:

Net Income:

Qualify for Disability? YES NO

Tuition (if yes, provide receipts)? YES NO

Childcare Expenses (if yes, provide receipts)? YES NO

Dependent Information #3

Name:

SIN:

Relationship:

Date of Birth:

Net Income:

Qualify for Disability? YES NO

Tuition (if yes, provide receipts)? YES NO

Childcare Expenses (if yes, provide receipts)? YES NO

Dependent Information #4

Name:

SIN:

Relationship:

Date of Birth:

Net Income:

Qualify for Disability? YES NO

Tuition (if yes, provide receipts)? YES NO

Childcare Expenses (if yes, provide receipts)? YES NO

INCOME AND DEDUCTIONS

Upload your electronic copies of receipts and Slips (T4, T5, RRSP, Donation, Medical, etc.) securely by clicking the box below.

Deductions from Income (check all that apply)

Are you a participant in the Home Buyers Plan or Life Long Learning Plan?

Do you agree to split pension income with your spouse?

Did you make Union or Professional dues during the year?

Did you make or receive spousal or child support payments?

Did you incur costs including interest to earn investment income?

Did you incur moving costs for employment or to start a new business?

Did you incur unreimbursed expenses in the course of your employment?

Did you incur legal expenses to obtain or enforce a right to wages, pension or support from a former spouse?

Did you repay any social benefits to the government?

Tax Credits (check all that apply)

Did you incur costs for adoption?

Did you care for dependent other than a child?

Are you disabled?

If yes above, do you have a signed T2201?

Did you pay interest on student loans?

Did you pay tuition to a post-secondary institution?

Did you pay premiums to health insurance plan?

Did you pay for medical expenses for yourself or dependent?

Did you make any charitable contributions?

Did you make and political contributions?

Did you pay any tax via instalments?

Rental Property Income and Expenses

Property Address:

Number of rental units:

Joint Owner? (name and SIN):

Your percent of ownership:

Rental income:

Expenses

Advertising:

Bank Charges:

Insurance:

Interest:

Maintenance and Repairs:

Office expenses:

Professional fees:

Property taxes:

Utilities:

Other:

Capital Dispositions/Expenditures

Purchase price of rental property:

Land value:

Major renovations and purchases:

Proceeds of disposition:

Costs of disposition:

Self-employment Income and expenses

Business Name (operating as):

Address:

Joint Owner (name and SIN):

If yes to previous, percent of ownership:

Registered for GST? YES NO

If yes to previous, what is the filing frequency?

If yes to previous, Do items below include GST in totals? YES NO

If yes to previous, Have you filed all returns? YES NO

If no to previous, do you need us to file your returns? YES NO

Business Income:

Services Income

Product Income

Expenses (except auto and home office)

Purchases of product/raw material:

Subcontract expense:

Advertising and promotion:

Bad debts:

Business taxes:

Delivery, freight and postage:

Business/Liability Insurance:

Interest and bank charges:

Maintenance and repairs:

Meals and entertainment:

Office expenses:

Professional fees:

Rent:

Salaries and wages:

Travel:

Business and/or cellular phone:

Internet:

Private health plan (if not claiming as medical expense):

Capital expenditures (provide copies of receipts):

Automobile (Self-employed/employment) expenses

If expenses are related to employment expenses please provide a copy of the T2200 provided by your employer.

year and make of car:

Date purchased/leased(please provide documentation):

Total km driven during the year: KM

Total km driven to earn income: KM

Fuel costs:

Interest on vehicle loan:

Insurance:

License and registration

fees: Maintenance and repairs:

Home Office(self-employed/employment) expenses

Area of home used for business: sqft

Total area of home: sqft

Expenses

Utilities - Electricity:

Utilities - GAS:

Utilities - WATER/WASTE/RECYCLE:

Insurance:

Mortgage interest:

Property taxes:

Repairs and maintenance:

Condo fees:

Security costs:

Other: