



PERSONAL TAX INFORMATION CHECKLIST 2016

Name: _____ Birthdate (mm/dd/yyyy): _____
S.I.N. _____ Marital Status: _____
Citizenship: _____

Address:

Street: _____
City: _____
Province: _____
Postal Code: _____

Contact Information:

Tel (Home): _____
Tel (Cell): _____
Fax: _____
Email: _____

Spousal Information:

Name: _____ Birthdate (mm/dd/yyyy): _____
SIN: _____ Marital Status: _____

Children Information:

Child 1 (if applicable)

Name: _____ Birthdate (mm/dd/yyyy): _____
S.I.N. _____ Citizenship: _____

Did they participate in any recreational sports? Yes/No (circle one)
Did they participate in any arts program? Yes/No (circle one)
Did they attend a post-secondary institution? Yes/No (circle one)
Will they be transferring tuition tax credits to you? Yes/No (circle one)
Did you incur child care expenses on behalf of this child? Yes/No (circle one)

Child 2 (if applicable)

Name: _____ Birthdate (mm/dd/yyyy): _____
S.I.N. _____ Citizenship: _____

Did they participate in any recreational sports? Yes/No (circle one)
Did they participate in any arts program? Yes/No (circle one)
Did they attend a post-secondary institution? Yes/No (circle one)
Will they be transferring tuition tax credits to you? Yes/No (circle one)
Did you incur child care expenses on behalf of this child? Yes/No (circle one)

*If you answered yes to any of the questions above, please attach the T2202A slips, Recreational Tax Receipt and/or Art Tax Receipt
*If you incurred child care expenses, please provide the amount, name and S.I.N. of the caregiver or the name of the relevant institution



Dependent Information:

In the year, did you have any dependents that you looked after? (This can include a spouse, child, parent, grandparent, grandchild, sibling, aunt or uncle) Yes/No (circle one)

If you answered yes, please fill out the following:

Name: _____ Birthdate (mm/dd/yyyy): _____
S.I.N.: _____ Marital Status: _____
Net Income:* _____

*Net Income includes any salary, dividend, and interest income less any RRSP contributions and moving expenses during the year

Additional Information:

Were you employed or self-employed during the year? employed/self employed (circle one)
 Did you work in the U.S. during the year? Yes/No (circle one)
 Did you become or cease to become a Canadian resident in the current year? Yes/No (circle one)
 If yes, please include the date of departure or entry
 Do you authorize the Canada Revenue Agency to give personal details to Elections Canada? Yes/No (circle one)
 Did you own or hold any foreign property at anytime during the year with cost over \$100,000?* Yes/No (circle one)
 *If yes, please provide T1135 reporting package from your investment broker Yes/No (circle one)

New clients please provide your 2015 Tax Return and 2015 Notice of Assessment.

<i>Income Slip Checklist</i>	<i>Attached</i>	<i>Income Slip Checklist</i>	<i>Attached</i>
Employment (T4/T4A)	Yes/No	Interest/Dividends/Capital Gains (T5)	Yes/No
Canada Pension Plan Benefit (T4A(P))	Yes/No	Estates/Trusts/Mutual Funds (T3)	Yes/No
Old Age Security Pension Income (T4A(OAS), T4A(P))	Yes/No	Partnerships (T5013)	Yes/No
Other Pension Income	Yes/No	Scholarships, Bursaries, Fellowship (T4A)	Yes/No
RRSP, DPSP, RRIF (T4A, T4RSP, T4RIF)	Yes/No	Employment Insurance Benefitis (T4E)	Yes/No
		Disability Payments Received (T4A, T5007)	Yes/No
<i>Other Income Sources</i>		<i>Other Income Sources</i>	
Rental Income	Yes/No	Self-Employment/Professional Income	Yes/No
Alimony or separation income received as per written agreement	Yes/No	Foreign Source Income	Yes/No

*If you collected rental income or self-employment/professional income please attach a summary of revenues received and expenses paid.
 If financial statements have been prepared please provided us with a copy
 *If you were a commissioned salesperson, please include a summary of all the expenses incurred to earn income
 *Provide us with the T2200 form provided by your employer if you are claiming employment expenses



Notes:

1. For rental properties, please ensure you provide us with any interest incurred during the year in order to acquire the property. In addition, if the property was either purchased or sold during the year, please provide us with the details.
2. If you are self-employed, a subcontractor, or a commissioned employee and wish to claim automobile expenses (that have not been claimed elsewhere) please provide the following: the date of purchase, the make and model, the purchase price/leasing costs, insurance costs, fuel, license, repairs and maintenance, car wash, and interest expenses. Please also provide the total kilometers driven during the year and total kilometers driven for business purposes.
3. If you use your home office as a place to do business and meet clients, please indicate the area used exclusively for business in comparison to the total area of your home. In addition, please include all household expenses that are relevant - mortgage interest, utilities, telephone, insurance, property taxes, condo fees and internet.

Additional Personal Information:

<i>Tax Deduction/Credit Checklist</i>	<i>Attached</i>	<i>Tax Deduction/Credit Checklist</i>	<i>Attached</i>
RRSP, DPSP or Other Pension Plan Contributions	Yes/No	Child Fitness Credit	Yes/No
Professional/Union Dues	Yes/No	Child Art Amount	Yes/No
Student Loan Interest Statement	Yes/No	Child Care Expenses	Yes/No
Commission Expense Summary	Yes/No	Medical Expenses	Yes/No
Charitable Donations	Yes/No	Accounting Fees	Yes/No
Political Contributions	Yes/No	Public Transit Passes	Yes/No
Tuition Fees Paid (T2202A)	Yes/No	Moving Expenses	Yes/No
Rental Expense Summary	Yes/No	First Time Home Buyer's Amount	Yes/No
Self-Employment Expense Summary	Yes/No	Alimony or separation allowance payments	Yes/No
Interest Paid on Non-Registered Investments	Yes/No	Adoption Expenses	Yes/No
Disability Tax Credit	Yes/No	Management Fees	Yes/No
		Investment Counsel Fees	Yes/No

<i>Other Information Checklist</i>	<i>Attached</i>		
Notice of (Re)Assessments for Prior Years	Yes/No	2016 Capital Gain/Loss Report	Yes/No
Tax Shelters	Yes/No	Capital Gains Election of Prior Years	Yes/No
Sale Statement for Properties	Yes/No	Foreign Income and Foreign Taxes Paid	Yes/No
Home Buyers Plan (RRSP) Transactions	Yes/No	Signed T1 Engagement Letter	Yes/No
T1135 Foreign Property over \$100,000	Yes/No	T2200 Employer Authorization for Expenses	Yes/No

<i>Ontario Trillium Benefits</i>	<i>Attached</i>	<i>Principal Residence</i>	<i>Attached</i>
Rent Paid for Principal Residence	Yes/No	Did you sell during year the year?	Yes/No
Property Taxes Paid for Principal Residence	Yes/No	If yes provide: Address, Year Acquired, Sale Proceeds	Yes/No