

NEW CLIENT - PERSONAL TAX CHECKLIST

Check if Applicable to You...	Documentation Required...
EMPLOYMENT, PENSION, RETIREMENT AND ANNUITY INCOME	
<input type="checkbox"/> Regular Earnings (Wages and Salaries)	T4 Slip
<input type="checkbox"/> Profit Sharing Income	T4PS Slip
<input type="checkbox"/> Old Age Security	T4A (OAS) Slip
<input type="checkbox"/> Canada Pension Plan	T4A (P) Slip
<input type="checkbox"/> Foreign Income	Details of Income, Foreign Slips
<input type="checkbox"/> Other Employment (including Retirement Allowances)	T4A Slip
<input type="checkbox"/> Registered Retirement Income Fund	T4RIF Slip
<input type="checkbox"/> Withdrawals from an RRSP (including Home Buyers Plan)	T4RSP Slip
INVESTMENT INCOME	
<input type="checkbox"/> Interest from Bank accounts, Term Deposits and GICs	T5 Slip
<input type="checkbox"/> Mutual Fund Investment Income	T3 Slip
<input type="checkbox"/> Dividends from Canadian Corporations	T5 Slip
<input type="checkbox"/> Interest from Canada Savings Bonds	T5, T600 or T600C Slip
PURCHASE AND SALE OF INVESTMENTS and INVESTMENT EXPENSES	
<input type="checkbox"/> Stocks, Bonds and Trust units	Transaction slips, Broker account statements
<input type="checkbox"/> Real Estate and Other Properties	Sale / Purchase Legal Documents
<input type="checkbox"/> Sale of Principal Residence	Sale Legal Documents
<input type="checkbox"/> Properties Gifted to Others	Full Details
<input type="checkbox"/> Money Borrowed to Earn Investment Income	Record of Amounts Paid
<input type="checkbox"/> Money Borrowed on Margin Account (Stocks)	Records from Broker
<input type="checkbox"/> Accounting Fees to Record Income	Details of Charges
<input type="checkbox"/> Investment Counsel and Investment Management Fees	Details of Charges
<input type="checkbox"/> Tax Shelters	Purchase Documents
OTHER INCOME	
<input type="checkbox"/> Employment Insurance Benefits	T4E Slip
<input type="checkbox"/> Workplace Compensation Benefits	T4, T5007 Slip
<input type="checkbox"/> Social Assistance Payments	Full Details
<input type="checkbox"/> Alimony or Child Support Received	Full Details
<input type="checkbox"/> Scholarships and Bursaries	T4A Slip
<input type="checkbox"/> Self Employment Income	See Website for 2125 worksheet
RENTAL INCOME	
<input type="checkbox"/> Details of Revenue and Expenses	See Website for 776 worksheet
<input type="checkbox"/> Purchase / Sale of Property	Sale / Purchase Legal Documents
<input type="checkbox"/> Rental of a Portion of a Personal Residence	Details of Split
EMPLOYMENT AND COMMISSION RELATED EXPENSES	
<input type="checkbox"/> Form required to allow deduction of certain expenses	Form T2200
<input type="checkbox"/> Vehicle Expenses	Expense Details and Calculation of Business Mileage
<input type="checkbox"/> Moving Expenses	Details of Charges (See Website for T1-M Worksheet)
<input type="checkbox"/> Sales Expenses	Expense Details
<input type="checkbox"/> Home Office	Details of sqft used, Utilities, Interest and Taxes
<input type="checkbox"/> Transport Employees	Form TL2
<input type="checkbox"/> Union or Association Dues	Official Tax Receipts
OTHER	
<input type="checkbox"/> Medical Expenses - Paid	Receipts
<input type="checkbox"/> Medical Expenses - Travel	Doctor's Letter requiring travel, Dates of appointments
<input type="checkbox"/> Medical Travel > 40k	List of appointment dates and locations
<input type="checkbox"/> Tuition / Education Expenses	T2202A from School
<input type="checkbox"/> Charitable Donations / Political Contributions	Official Receipts
<input type="checkbox"/> Child Care Expenses	Official Receipts
<input type="checkbox"/> Interest Paid on Student Loans	Official Receipts
<input type="checkbox"/> Transit Pass Deduction	Official Receipts
<input type="checkbox"/> Disability Tax Credit	T2201
<input type="checkbox"/> Alimony or Separation Allowance Paid	Full Details
<input type="checkbox"/> Property Taxes	Final Property Tax Bill
<input type="checkbox"/> Rent Paid	Receipts Covering Year (Landlord's Name, Address & Total)