

Name \_\_\_\_\_

**Items to be considered kept and submitted to me for the preparation of your tax return. Please note this list is not all-inclusive. Please feel free to ask me about any items you feel may have an impact on your tax return. So that I can make sure you do not pay any more taxes than you have to, while at the same time, you do not get penalized for failing to report.**

**If I have not prepared your returns in the past, please complete and bring in form T1013, available from my website. Also, additional copies of this checklist are available on my website, BertMulder.com**

Phone number(s):

Email address:

Marital status:

Date of birth:

Current permanent address

Do you wish to use direct deposit? If so, please provide banking info, if changed from last year. Please note that you no longer have the option to have your Child Tax Benefit or GST credit go to a different account:

Bank number \_\_\_\_\_ Branch number \_\_\_\_\_ Account number \_\_\_\_\_

Marital status: \_\_\_\_\_ if married or common law, please also provide one of these forms for your spouse.

Did your marital status change in the last year?

Are you Canadian citizen?

Are you American citizen or green card holder? \_\_\_\_\_ Your spouse? \_\_\_\_\_

Your dependents:

| Name | relationship | date of birth | sin/(ssn if applicable) |
|------|--------------|---------------|-------------------------|
|------|--------------|---------------|-------------------------|

**Are you or any of your dependents eligible for the disability deduction? Are any otherwise infirm?**

Name \_\_\_\_\_

**Please bring in any notices you received from the tax department during the last year.**

**Income slips and records:**

- T4 slips from every place you worked last year
- Did you receive any tips?
- If you received pension income, all your pension income slips - T4A(OAS), T4A(P), T4A, T4RRSP, T4RIF, etc.
- If you have children under 7, your Universal child care benefit slip RC62
- If you received unemployment, your T4E.
- If you received any investment income, your slips T3, T5, T101, T5008, T5013
- If you cashed any RRSP's, your T4RSP's
- If you have a profit share plan at work, your T4PS
- If you received any other income, reported on form T4A
- Did you work as a subcontractor? Your forms T5018.
- Do you have any rental properties? Please provide records.
- Did you sell, reinvest, convert, or otherwise dispose of any investments? Please provide all your broker statements or other record of such.
- Did you receive any alimony or child support? Please provide details
- Did you have any income from self-employment? If so, please provide records. Did you prepare your own books? What software did you use? Preferably, bring in copy of your computer data. Please ask me for details as to what I will need.
- Any questions on any other income you might have received?

**Deduction and tax credit receipts and records:**

- RRSP receipts? Official receipts are required
- Union or professional dues? Official receipts are required
- Did you pay any childcare expenses, including lunchtime and after school care, as well as any camps?
- Did you pay for any disability supports?
- Did you incur any business investment losses?
- Did you move more than 40km? If so, you may be able to claim moving expenses.
- Any investment carrying charges?
- Did you pay for any investment counseling?
- Are you required to pay expenses for work? Please provide records. Do you have a form T2200 from your employer? If you are required to pay auto expenses, please provide mileage log.
- Did you pay any legal fees, which may be deductible?
- Are you a transportation employee that can deduct meals and lodging expenses?
- Did you pay for public transit for you or family members?

Name \_\_\_\_\_

- Did your children participate in any fitness or artistic activities?
- Are you a first time homebuyer? Please bring in the legal documents.
- Did you cash any RRSP to buy a home?
- Did you pay any adoption expenses?
- Are you the caregiver for any infirm dependent person?
- Did you pay any student loan interest?
- Did you or any of your dependents go to any post-secondary school? Please provide all forms T2202, which are generally available from the school's website.
- Did you pay any medical expenses? This includes prescriptions, dental, glasses, contact lenses, chiropractic and many other medically required items. Please ask if unsure. Pharmacists will generally give you a printout for the year, if asked.
- Did you make any charitable donations? Official receipts are required.
- Did you contribute to any political parties? Official receipts are required
- Did you participate in any tax shelters?
- Are you a northern resident?
- If you are an apprentice/tradesman, did you buy any tools?
- Did you have to repay any income?
- Did you pay any tax instalments?

#### **Foreign income and investments**

- Did you work overseas? Do you qualify for the 'overseas employment tax credit'?
- Did you have any foreign income? Please provide slips you received in connection with this.
- Do you have any foreign assets or investments? Please provide listing, complete with your cost and income derived from the asset during the year.

#### **American citizens/green card holders**

- If either you or your spouse are American or green card holder, you are required to prepare US returns in addition to your Canadian return. I can prepare those for you. If you are a green card holder, you can get an exemption.
- What year did you last file a US return?
- If a green card holder, did you ever apply for an exemption?
- Your social security number: \_\_\_\_\_ Your spouse's snn (if any)

Name \_\_\_\_\_

**Do you have any other notes or questions? Please include those here:**