



### Personal Tax Checklist

First & Last Name: \_\_\_\_\_

☐ Sign Me up for the Newsletter

Email Address: \_\_\_\_\_

Are you a Canadian Citizen?

Did you arrive in Canada this past year?

Date Arrived: \_\_\_\_\_

Province of residence on December 31<sup>st</sup>:

Full Mailing Address: \_\_\_\_\_

Please include apt#, city, province, and postal code

Phone: \_\_\_\_\_ Date of Birth (YYYY/MM/DD): \_\_\_\_\_

S.I.N: \_\_\_\_\_ Marital Status: \_\_\_\_\_

### Spouse's Information (If applicable)

First & Last Name: \_\_\_\_\_ S.I.N: \_\_\_\_\_

Are you a Canadian Citizen? Date of birth (MM/DD/YYYY): \_\_\_\_\_

### Dependants

| First & Last Name | Date of birth (MM/DD/YYYY) | S.I.N (if applicable) | Net Income (if applicable) |
|-------------------|----------------------------|-----------------------|----------------------------|
|                   |                            |                       |                            |
|                   |                            |                       |                            |
|                   |                            |                       |                            |

### TAX SLIP CHECKLIST – CHECK ALL THAT APPLY

#### Personal Income

- ☐ T4, T4A – Salaries, Employment, Pension
- ☐ Other Employment Benefits
- ☐ T4A (P) – CPP Benefits
- ☐ T4 (OAS) – Old Age Security Benefits
- ☐ T4RIF – RRIF Income
- ☐ T4E – Employment Insurance Benefits
- ☐ T5007 – Social Services Benefits
- ☐ T11137 – Statement of Account – Home Buyer's Plan
- ☐ T4RCA – Retirement Income
- ☐ RC62 – Universal Child Care Benefit

#### Investment Income

- ☐ T3, T5, T4PS – Interest and Dividends
- ☐ T5008 – Statement of Security Transactions
- ☐ Interest on 2015 Tax Refund
- ☐ T6000 – Canada Savings Bonds
- ☐ T3 – Income from Mutual Funds
- ☐ Rental Income \*
- ☐ T5013 – Net Partnership Income (Loss)
- ☐ Capital Gain/Losses \*



### Other Income

- ☐ Alimony Received
- ☐ Scholarship/Bursaries
- ☐ Professional Earnings

### Business

- ☐ Employment Earnings \*
- ☐ T5018 – Statement of Contract Payments
- ☐ Other – Specify

### Other Deductions

- ☐ RRSP Receipts
- ☐ Union, Professional Dues
- ☐ Alimony Paid
- ☐ Attendant Care Expenses
- ☐ Interest Carrying Charges on Investments
- ☐ Investment Counsel/Accounting Fees
- ☐ Employment Expenses \*
- ☐ E.I. Repaid
- ☐ Deductible Legal Fees
- ☐ T2200 Declaration of Condition of Employment \*
- ☐ TL2 – Claim for Board & Lodging Expenses
- ☐ Moving Expenses \*
- ☐ Allowable Business Investment Loss
- ☐ Capital Losses Carry Forward
- ☐ Non-Capital Losses Carry Forward
- ☐ Limited Partnership Losses of Other Years

### Non-Refundable Credits

- ☐ Married Amount – Spouse Net Income \$ \_\_\_\_\_
- ☐ Equivalent to Married Amount
- ☐ Disability Deductions\*
- ☐ T2202 – Tuition Fees/Education Credit
- ☐ T2202 – Tuition Fees/Education Credit for dependent
  - Dependent's Net Income \$ \_\_\_\_\_
- ☐ Interest Paid on Student Loans
- ☐ Medical Receipts
- ☐ Charitable Donations
- ☐ Dependent Data (For GST Credit and Child Tax Benefit)
- ☐ Family Caregiver (supported a dependant with physical or mental impairment)

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### OTHER INFORMATION

- ☐ 2015 Notice of Assessment
- ☐ Sale of principal residence in 2016 \*
- ☐ Details on Foreign Property held in 2016 where total cost exceeded \$100,000 Canadian
- ☐ Summary of 2016 Installment Payments
- This includes foreign shares held in Canadian trading accounts*

\* FULL DETAILS WILL BE REQUIRED FOR THESE ITEMS. SELF EMPLOYED INDIVIDUALS PLEASE ALSO COMPLETE THE FORM FOUND [HERE](#).

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Child Fitness - Total: \_\_\_\_\_ Child Arts - Total: \_\_\_\_\_ Childcare Expenses - Total: \_\_\_\_\_

Name of daycare or name and SIN of individual: \_\_\_\_\_

Total transit passes (weekly, monthly, Presto): \_\_\_\_\_ Total donations: \_\_\_\_\_

When finished, please save this form to your computer, and **contact your tax hero for a secure link**, and send along with all relevant tax slips and documentation (e.g. receipts).

Any questions please contact us via e-mail: [info@YourModernAccountant.ca](mailto:info@YourModernAccountant.ca)

**THANK-YOU!**