

Personal Income Tax Checklist

To assist in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation.

In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

For information on Audits, refer to [Understanding Tax: Audits](#).

For information on Personal Tax, refer to [Understanding Tax: Personal Tax](#).

Name _____

New Client
or New
Information
New Clients

<input type="checkbox"/>	Street	Phone
<input type="checkbox"/>	City Postal	Cell
<input type="checkbox"/>	Email	Birthday (m/d/y) / /
<input type="checkbox"/>	Tax return - last year filed	<input type="checkbox"/> Notice of Assessment

Marital
Status

<input type="checkbox"/>	Married or Common-Law	<input type="checkbox"/>	Spouse
<input type="checkbox"/>	Single or Widowed	<input type="checkbox"/>	Birthday (m/d/y) / /
<input type="checkbox"/>	Separated or Divorced	<input type="checkbox"/>	SIN: - -
<input type="checkbox"/>	Date of status change / /	<input type="checkbox"/>	Net income

Dependents

Name	Birthday (m/d/y)	SIN	Gender	Net Income
		- -	M F	\$
		- -	M F	\$
		- -	M F	\$

Other

<input type="checkbox"/>	Please provide any changes to your address or contact information	Y	N
<input type="checkbox"/>	Are you a Canadian citizen?	Y	N
<input type="checkbox"/>	Release information to Electons Canada?	Y	N
<input type="checkbox"/>	Are you registered for DirectDeposit?	Y	N
<input type="checkbox"/>	Did you hold any foreign property in the year, where the total cost exceeded \$100,000 CDN?	Y	N
<input type="checkbox"/>	Did you sell your principal residence? If yes, complete Sale of Principal Residence Section, page 2	Y	N

Documents

<input type="checkbox"/>	Notice of Assessment	<input type="checkbox"/>	Summary of instalment payments and receipts
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Income

Personal	Investment		
<input type="checkbox"/>	T4 – Employment Income	<input type="checkbox"/>	T3 – Estate/Trust/Mutual Funds Income
<input type="checkbox"/>	Other Employment Income (Tips, benefits)	<input type="checkbox"/>	T5/T3 – Interest and Dividend Income
<input type="checkbox"/>	T4A (OAS) – Old Age Security	<input type="checkbox"/>	T600 – Canada Savings Bonds
<input type="checkbox"/>	T4A (P) – CPP Benefits	<input type="checkbox"/>	T5008 – Statement of Security Transactions
<input type="checkbox"/>	T4A – Pension and other income	<input type="checkbox"/>	T5013 – Limited Partnership Income
<input type="checkbox"/>	T4E – Employment Insurance benefits	<input type="checkbox"/>	Capital Gains/Losses
<input type="checkbox"/>	T5007 – Social Assistance/WCB	<input type="checkbox"/>	Rental Income (use checklist)
<input type="checkbox"/>	T4 RSP – RRSP Income	<input type="checkbox"/>	Foreign Income
<input type="checkbox"/>	T4 RIF – RRIF Income		
<input type="checkbox"/>	Self-Employed Income (use checklist)		
<input type="checkbox"/>	Alimony Received \$		

