

# PERSONAL TAX INFORMATION CHECKLIST

## 1. PERSONAL INFORMATION

Did you or your spouse/common-law, at any time in 2007 hold foreign property with a cost of more than \$100,000 CDN? (Yes/no):

Do you authorize CRA to provide your name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors? (Yes/no)

If you do not want to E-File your return to the CRA write "NO" in this box.

**PLEASE ENSURE THAT YOU INCLUDE THE FOLLOWING INFORMATION:  
A FULL COPY OF YOUR PREVIOUS YEARS INCOME TAX RETURN, YOUR  
PREVIOUS YEARS NOTICE OF ASSESSMENT AND THE PRE-PRINTED  
ADDRESS LABELS SENT TO YOU FROM CRA.**

Name \_\_\_\_\_

*(First name, middle initial, last name)*

Address \_\_\_\_\_

City/Prov. \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

SIN \_\_\_\_/\_\_\_\_/\_\_\_\_ Birth date (dd/mm/yy) \_\_\_\_\_

Marital Status \_\_\_\_\_ *(If marital status has changed in past year  
please provide details of Separation Agreement and deduction allocation)*

## 2. SPOUSE (including common-law)

If marital status changed during the year, enter date of change: \_\_\_\_\_

Name                      Birth date (dd/mm/yy)                      SIN                      Net Income (line 236)\*

## 3. DEPENDANTS (children, parents and others dependant on you for financial support)

Name                      Relationship                      Birth date                      SIN                      Net Income                      Live with  
*(dd/mm/yy)*                      *(line 236)\**                      you

For any dependant who is infirm, please identify dependant and describe nature of infirmity:

\*provide details of income and deductions only if we are not preparing the tax return. \*\*Indicate whether dependant lived with you during the year (yes/no).

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## STATEMENT OF INCOME AND EXPENSES

### Income

Sales, commissions or fees  
(Excluding GST, HST & PST) \_\_\_\_\_

GST/HST collected on sales \_\_\_\_\_

Other income (please indicate source) \_\_\_\_\_

Are you using the GST Quick Method? (Y/N) \_\_\_\_\_

Have you tracked your GST separately? (Y/N) \_\_\_\_\_

Was income listed on a T4A? (Y/N) \_\_\_\_\_

Do you require help with your GST filing (Y/N) \_\_\_\_\_

Is GST return included (Y/N) \_\_\_\_\_

### Expenses

TOTAL

GST     Incl.     Excl.

GST method \_\_\_\_\_

Cost of goods sold \_\_\_\_\_

Advertising \_\_\_\_\_

Bad debts \_\_\_\_\_

Business tax \_\_\_\_\_

Licenses, dues, membership's \_\_\_\_\_

Delivery, freight, courier \_\_\_\_\_

Business insurance \_\_\_\_\_

Interest \_\_\_\_\_

Maintenance and repairs \_\_\_\_\_

Management and admin. Fees \_\_\_\_\_

Meals and entertainment (total) \_\_\_\_\_

Office expenses \_\_\_\_\_

Supplies \_\_\_\_\_

Legal, accounting and other professional fees \_\_\_\_\_

Rent \_\_\_\_\_

Salaries, wages and benefits \_\_\_\_\_

Supplemental health insurance premiums \_\_\_\_\_

Travel \_\_\_\_\_

Telephone (see Note1) \_\_\_\_\_

Internet and network services \_\_\_\_\_

Other (provide details) \_\_\_\_\_

Note 1: Include telephone charges for a separate business or fax line and business related long distance charges and business cell phone bills.

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**AUTOMOBILE EXPENSES:** (provide total expense (do not prorate) for each vehicle used for business purposes during the year)

Employment  Business  (please check one)

	Vehicle 1	Vehicle 2
Make of vehicle	_____	_____
Date of acquisition	_____	_____
Date of disposition (if in the year)	_____	_____
Cost before GST & PST	_____	_____
GST and PST	_____	_____
Km driven for business	_____	_____
Km driven in year (total)	_____	_____
Total expenses incurred		
Monthly lease cost	_____	_____
Fuel and oil	_____	_____
Maintenance & repairs	_____	_____
Insurance	_____	_____
License & registration	_____	_____
Interest	_____	_____
Auto Club (e.g. CAA)	_____	_____
Car Washes	_____	_____
Parking	_____	_____
Other (provide details)	_____	_____

\*Please provide purchase agreement (showing purchase price, trade-in value and down payment), or lease term sheet (showing Manufacturers List Price and down payment), as applicable.

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**WORK SPACE IN THE HOME:** (provide total expenses – do not prorate)

Employment  Business

Office area (square footage) \_\_\_\_\_

Total area (square footage) \_\_\_\_\_

Mortgage Interest	_____
Property taxes	_____
Insurance	_____
Rent	_____
Heat	_____
Electricity	_____
Water	_____
Repairs & maintenance	_____
Security	_____
Landscaping/snow removal	_____
Other (provide details)	_____

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**EMPLOYMENT EXPENSES** (Attach T2200 from Employer)

Please attach a detailed listing of **other employment expenses** *not* reimbursed by your employer (including meals, lodging, travel, parking, promotion, supplies, cell phone/telephone charges – NOTE: *restrictions apply and vary depending on whether you are a commissioned salesperson*).

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**SELF-EMPLOYED INFORMATION CHECKLIST (UNINCORPORATED BUSINESS)**

Registered business name: \_\_\_\_\_ Partnership (yes/no): \_\_\_\_\_

Date business commenced (mm/yy): \_\_\_\_\_

Fiscal year-end (dd/mm/yy): \_\_\_\_\_

GST registered (yes/no): \_\_\_\_\_ Business #: \_\_\_\_\_

Please attach a detailed listing of capital assets purchased or disposed of during the year (including furniture, equipment, and computers).

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**RENTAL EXPENSES** (Fill out one for each property)

Was this the **first** year of operation? (*Yes/no*) \_\_\_\_\_

Was this the **last** year of operation: (*Yes/no*) \_\_\_\_\_

Address of Property: \_\_\_\_\_

# of Units \_\_\_\_\_

Personal Use % \_\_\_\_\_

Total Gross Rents \_\_\_\_\_

- please attach a detailed listing of any co-owners or partners, including their name, address, and SIN and percentage ownership. (If not already on file)
- please attach a detailed listing of capital assets purchased or disposed of during the year (including furniture, equipment and appliances).

**EXPENSES**

Advertising	_____
Insurance	_____
Repairs & maintenance (provide details)	_____
Motor vehicle expenses	_____
Office expenses	_____
Legal, accounting & other professional fees	_____
Property taxes	_____
Salaries, wages and benefits	_____
Travel	_____
Utilities	_____
Other expenses (provide details)	_____

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**INCOME TAX REFUND AND GST CREDIT**

Complete banking information to have your income tax refund and GST/HST credit payments deposited into your bank account.

Branch Number (5-digits) Institution Number (3-digits) Account Number (Max. 12-digits)

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**T-SLIPS (INCOME)**
**Attached**

*These are the standard prescribed forms on which Canadian income is reported:*

***Employment income***

Employment/commission income	<b>T4, T4A</b>	_____
Director's fees	<b>T4, T4A</b>	_____
Employee profit sharing	<b>T4PS</b>	_____

***Pension/retirement income***

Pension/annuity income	<b>T4A, T4A (OAS), T4A (P)</b>	_____
Income from RRSP or RRIF	<b>T4RSP, T4RIF</b>	_____

***Investment income***

Interest & dividends	<b>T5</b>	_____
Mutual funds and other trusts	<b>T3</b>	_____

***Other sources***

Income from RESP	<b>T4A</b>	_____
Partnership income	<b>T5013</b>	_____
Employment insurance benefit	<b>T4E</b>	_____
Purchase and sale of securities	<b>T5008</b>	_____
Tax shelters	<b>T101, T5013</b>	_____

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**OTHER INCOME**

Details of all other income including pensions received, directors' fees, scholarships, etc. \_\_\_\_\_

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**INVESTMENTS (Income/Expenses)**

**Interest and other carrying charges** paid to earn income from investments (including safety deposit box, accounting and investment counsel fees). \_\_\_\_\_

**Gains or losses** from selling securities or other capital property –e.g. stocks, Bonds, mutual funds, real estate (including broker's trading summaries or a Transactions list showing *date of each purchase and sale*, currency, original Cost and transaction fees. \_\_\_\_\_

Detailed listing of income and expenses from **rental properties** (request Worksheet, if necessary), on a property by property basis (indicate owners Split.) \_\_\_\_\_

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## DEDUCTIONS/TAX CREDITS

*Please provide the receipts/forms received for these deductions/credits:*

RRSP contributions	_____
Home Buyers Plan withdrawals or repayments	_____
Lifelong Learning Plan withdrawals or repayments	_____
Charitable donations (provide details for in-kind donations, such as shares of stock)	_____
Political donations	_____
Professional/union dues	_____
Attendant care (if you claim the disability tax credit)	_____
Interest paid on student loans	_____
Legal fees ( <i>see Note 1</i> )	_____
Moving expenses ( <i>see Note 2</i> )	_____
Alimony, maintenance or child support paid or received ( <i>see Note 3</i> )	_____
Income tax installments ( <i>see Note 4</i> )	_____
<b>Disability tax credit T2201</b>	_____
Medical expenses ( <i>see Note 5</i> )	_____
Tuition fees and Education deduction ( <i>see Note 6</i> )	_____
Childcare expenses ( <i>see Note 7</i> )	_____

- Note 1** If you incurred legal expenses in connection with employment termination, or claiming spousal or child support, please provide details.
- Note 2** If you moved at least 40 kilometers closer to a new place of work or school, please contact us to request for T1-M.
- Note 3** The amount of alimony, maintenance or child support paid or received in the year and the name, SIN, and address of the recipient, if applicable.
- Note 4** Details regarding income tax installment payments made during the year (include recent CRA statement of Account or cancelled cheques).
- Note 5** Include receipts for all medical and health related expenses including nursing, nursing home, prescription eyewear, prescription drugs, supplemental health insurance premiums, medical devices and orthotics, ambulance, travel expenses, dental, chiropractic, naturopath, homeopath and other medical treatments, or cost of specialized services required because of a medical or physical impairment. If any of these expenses were covered by insurance, please provide copies of all claims reports issued by the insurer.
- Note 6** Dependant must complete and sign form T2202 if the credit is being transferred to a supporting person.
- Note 7** Details regarding child care expenses for children 16 & under, including the name of the provider, social insurance number, if an individual, fees for camps, programs and lessons