

## Personal Tax Checklist

Name: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Address: \_\_\_\_\_  
Street Address
City
Prov.
Postal Code

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Birth date: \_\_\_\_\_

SIN: \_\_\_\_\_

Marital Status: \_\_\_\_\_

### Dependents

Name	S.I.N	Birth date	Net Income (if applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## INCOME

### Personal Income

- T4, T4A – Salaries and Employment Income
- T4A (P) – CPP Benefits
- T4 (OAS) – Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – Social Services Benefits
- RC62 – Universal Child Care Benefit
- T4RSP – RRSP Income
- Other Employment Benefits

### Investment Income

- T3, T5, T4PS – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on prior year tax refund
- Capital Gain/Losses (Full details)
- T3 – Income from Mutual Funds
- Annuities
- Rental Income\*
- T5013 – Net Partnership Income (Loss) any Limited Partnership

### Sale of Real-Estate

Please note that all sales of real-estate property are now required to be reported to CRA on your personal income tax return, including the sale of your principal residence. Please provide the following information for each real-estate sale transaction:

- |                                                                                                            |                                                                                                    |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Original purchase price: \$ _____                                                 | <input type="checkbox"/> Sale proceeds \$ _____                                                    |
| <input type="checkbox"/> Date of purchase _____                                                            | <input type="checkbox"/> Date of sale _____                                                        |
| <input type="checkbox"/> Lawyer's/Notary's statement of adjustments for the original purchase and the sale | <input type="checkbox"/> Details on adjustments to ACB – major improvements, realtor's commissions |
| <input type="checkbox"/> Principal residence: <input type="checkbox"/> Yes <input type="checkbox"/> No     |                                                                                                    |

\*Please fill out the relevant summary sheet available on our website [www.cahillcpa.ca](http://www.cahillcpa.ca)

### **Other Income**

- Alimony Received
- Taxable Child Support Received
- Scholarships/Bursaries
- Other (please explain below)

### **Non-Refundable Credit**

- Married Amount – Spouse's  
Net Income \$ \_\_\_\_\_
- Equivalent to Married Amount
- Disability Deductions  
(Full details required)
- T2202 – Tuition Fees/Education Credit
- Interest Paid on Student Loans
- Medical Receipts
- Charitable Donations

### **OTHER INFORMATION**

- Installment Payments \$ \_\_\_\_\_
- Details on Foreign Property held where total cost exceeded \$100,000 CDN – *This includes foreign shares held in Canadian trading accounts*

### **Business**

- Business Income/Expenses\*
- Farming/Fishing Earnings
- Professional Income/Expenses\*
- Other (please explain below)

### **Other Deductions**

- RRSP Contributions
- Union, Professional Dues
- Spousal support payments  
Medical/Attendant Care Expenses
- Interest Carrying Charges on  
Investments
- Investment Counsel and Accounting  
Fees
- Employment Expenses \* (please  
include T2200 form "Declaration of  
Conditions of Employment")
- Child Care Expenses (Full details  
required)
- Moving Expenses (Full details  
required)

Please attach additional pages to provide additional information or explanatory notes.

Please note that this list was compiled to include some of the more common income, deductions and tax credits that we see. Everyone's tax situation is unique so if you have any questions please make additional notes or give our office a call.