



2012 Personal Tax Checklist

To assist us in the preparation of your 2012 T1 Income Tax Return,
we have prepared the following tax checklist.

Please review this list for all **possible** applicable items relating to your particular circumstances.

Client Name: _____

This section for new clients or if information has changed

Address: _____

Birthdate: _____

SIN: _____ Marital Status: _____ Date of Change (if applicable) _____

Direct Deposit Information (if changed) (optional): Branch # _____ Institution # _____ Account # _____

Dependants (if space is insufficient, please attach a separate page)

Names	SIN	Birth Date	Relationship	Net Income (if any)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Please indicate whether you are willing to authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada to update your information of the National Register of Electors

Taxpayer Yes / No

Spouse Yes / No

NOTES:

(PLEASE MAKE NOTES OF ANY CONCERNS YOU MAY HAVE REGARDING YOUR TAX PREPARATION)

INCOME

Personal

- T4, T4A – Salaries and Employment Income
- Other Employment Benefits
- T4A (P) – Canada Pension Plan Benefits
- T4A (OAS) – Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RSP – RRSP Income
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – WCB Benefits / Social Services Benefits
- T1137 – Home Buyers Plan
- T4RCA – Retirement Income

Other

- Alimony Received
- Taxable Child Support Received
- Scholarships / Bursaries
- Universal Child Care Benefits
- Other – Specify

Investment

- T3, T5, T4'S – Interest and Dividends
- T5008 – Statement of Security Transactions
- Interest on Tax Refunds(s)
- T600 – Canada Savings Bonds
- T3 – Mutual Fund Income
- Foreign Income
- Annuities
- Rental Income (Full Details Required)
- Summary of Investment Contract Holdings
- T5013 – Limited Partnership Income (Loss)
- Capital Gains / Losses (Full Details Required)

Business

- Self –Employment Earnings Information
- Farming / Fishing Earnings Information
- Professional Earnings Information
- Self – Employed Commission Earnings Information

DEDUCTIONS & CREDITS

Non – Refundable Credits

- Married Amount –
Spouses Net Income \$ _____
- Equivalent to Married Amount
(Full Details Required)
- Disability Deductions
- T2202 - Tuition Fees / Education Credit
Dependants Net Income \$ _____
- Medical Receipts
- Charitable Donations
- Attendant Care Expenses
- Limited Partnership Losses of Other Years
- Monthly Transit Passes
- Child Fitness Receipts

Other Items

- Political Contribution Receipts
- Capital Losses Carry Forward
- Allowable Business Investment Loss
- Employment Insurance Benefit Repayments
- Dependant Data
(GST Credit and Child Tax Benefit)
- T2200 – Declaration of Conditions of
Employment
- Loss Carry Forward Information

Other Deductions

- RRSP Deductions
- Union / Professional Dues
- Alimony Paid
- Deductible Child Support Paid
- Safety Deposit Box Charges
- Interest Paid on Student Loans
- Interest and Carrying Charges on
Investments
- Investment Counsel & Accounting Fees
- Employment Expenses
(Full Details Required)
- Deductible Legal Fees
- Child Care Expenses (Receipts Required)
- Moving Expenses (Full Details Required)
- TL2 – Claim for Board and Lodging

Expenses

- Restricted Farming Losses Carry Forward
- Prior year Notice of Assessment
- Installment Payments for current year
- Details on Foreign Property held
(CND \$ 100,000.00)
- Capital and Non-Capital losses carry forward