



PERSONAL INCOME TAX RETURN CHECKLIST FOR _____

Basic Information

Name: _____
SIN: _____
Date of Birth: _____
Address: _____

Phone: () _____
Email: _____

Marital Status as at December 31:

Single ☐ Separated ☐
Married ☐ Common Law ☐
Divorced ☐ Widow ☐

Marital status changed during the year? ☐
If yes - date of change: _____

Spouse's Information

Name: _____
SIN: _____
Date of Birth: _____
Address: _____
(If different) _____
Phone: () _____
Email: _____

Spouse's net income: _____

Dependent information

Name	SIN	Date of Birth (YY-MM-DD)	Relationship	Email/Phone (if different from parent)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Residency and Foreign Reporting

Canadian citizen Yes ☐ No ☐
U.S. citizen or green card holder Yes ☐ No ☐

Did you become (or cease to be) a resident of Canada during the year? Yes ☐ No ☐
If yes, date of entry/departure: _____

As a Canadian citizen, can the CRA provide your name, address, date of birth and citizenship to Elections Canada? Yes ☐ No ☐

Do you authorize the CRA to share your full name, email address, and postal code with BC Transplant to contact you about organ donation and to maintain the Organ and Tissue Donor Registry? Yes ☐ No ☐

At any time in the year, did you own foreign property with a cost greater than C\$100,000?
(Please refer to the attached excerpt of Form T1135 and contact us with details of your foreign holdings) Yes ☐ No ☐

Information to provide

Did you sell any cryptocurrencies during the year?

Yes ☐ No ☐ (See schedule 7)

Did you sell or change the use (rental to personal use or vice versa) of residential real estate (including your home) during the year?

Yes ☐ No ☐ (See schedule 6)

Principal residence rules have changed.

Canadian and Foreign Sources of Income

Employment (T4) ☐

Employment insurance (T4E) ☐

Pension, retirement, annuity and other income (T4A) ☐

T4A(OAS) ☐

CPP/QPP/OAS (T4A(P)) ☐

RRSP, PRPP, DPSP, RPP, RRIF (T4RSP/T4RIF) ☐

Investment income (T5) ☐

Mutual funds/estates/trusts (T3) ☐

Partnership income (T5013) ☐

Support payments received ☐

Deductions and Credits

RRSP contributions ☐

First-time Home Buyer account contribution (T4FHSA) ☐

Union/professional membership dues ☐

Child care expenses ☐

Moving expenses ☐

Accounting/legal/investment counsel fees ☐

Interest paid to earn investment income ☐

Tuition fees (T2202A) ☐

Flow through shares(T101) ☐

First time home buyer ☐

Interest paid on student loans ☐

Adoption expenses ☐

Political/municipal contributions ☐

Deductible employment expenses (Please complete schedule 1) ☐

Charitable donations \$ _____

Medical/other paid disability expense
(net of reimbursements from extended benefit plan) \$ _____

Spousal support payments \$ _____

Child support payments \$ _____

Income tax instalments \$ _____

Foreign taxes paid \$ _____

Other sources of income:

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

Other expenses/deductions/credits:

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

Other documents

Last year's Notice of Assessment ☐

Through a matching program of tax information slips, the CRA is imposing significant penalties for unreported income. Please provide any late or amended tax slips (i.e. slips received after sending package to us) to avoid exposure to penalties.

Schedule 1**EMPLOYMENT EXPENSES**

Please include a signed T2200 - Declaration of Employment Conditions from your employer.

Travel	\$ _____
Parking	\$ _____
Supplies (stationery, other)	\$ _____
Telephone	\$ _____
Salaries paid to an assistant	\$ _____
Office rent	\$ _____
Accounting & legal*	\$ _____
Advertising & promotion*	\$ _____
Meals & entertainment*	\$ _____
Rental of office equipment*	\$ _____
Training*	\$ _____
Vehicle expenses	Complete Schedule 3
Home office expense	Complete Schedule 4

* Applies to commission employees only.

Schedule 3**VEHICLE EXPENSES (for Business & Employment)**

Year & make of vehicle	_____
Purchase/sale price	_____
Date of purchase/sale (See** below)	_____
Date lease began/ended (See ** below)	_____

** If purchased, leased or sold during the year, include relevant agreements.

Kms driven for business purposes during the year _____

Total Kms driven during the year _____

Expense

Fuel	\$ _____
Repairs & maintenance	\$ _____
Insurance	\$ _____
Licensing & registration fees	\$ _____
Loan interest	\$ _____
Lease payments	\$ _____
Car washes	\$ _____
Parking	\$ _____
Other _____	\$ _____
Other _____	\$ _____
Other _____	\$ _____
Other _____	\$ _____

Schedule 2**BUSINESS (Self-employed) INCOME & EXPENSES**

Name of business _____
 Type of business _____
 Names of partners and % owned _____
 SIN # of partners _____

Revenue \$ _____

Expenses \$ _____

Advertising \$ _____

Meals & entertainment \$ _____

Bad debts \$ _____

Insurance \$ _____

Interest & bank charges \$ _____

Licenses, dues, memberships & subscriptions \$ _____

Office expenses \$ _____

Supplies \$ _____

Accounting, legal & other professional fees \$ _____

Rent \$ _____

Repairs & maintenance \$ _____

Salaries \$ _____

Travel \$ _____

Telephone \$ _____

Vehicle expenses Complete Schedule 3

Equipment & furniture purchases

GST business number _____

Do the above amounts include GST? _____

Are we preparing your GST return? ☐ Yes ☐ No

Schedule 4**HOME OFFICE (for Business & Employment)**

Percentage of home used for business/employment Home _____%
 Business _____%

Heat \$ _____

Hydro \$ _____

Water \$ _____

Utilities \$ _____

Repairs & maintenance \$ _____

Insurance (See *** below) \$ _____

Property tax (See *** below) \$ _____

Rent \$ _____

Mortgage interest (self-employed only) \$ _____

*** Applies to commission employees and self-employed ONLY.

Schedule 5 RENTAL PROPERTY	
Include the Statement of Adjustments if purchased during the year	
Address	_____

Names of partners and % owned	_____
SIN # of partners	_____
Rental income	\$ _____
Expenses	
Advertising	\$ _____
Insurance	\$ _____
Mortgage interest	\$ _____
Office expenses	\$ _____
Accounting, legal & other professional fees	\$ _____
Management & administration/strata fees	\$ _____
Repair & maintenance	\$ _____
Salaries, wages & benefits	\$ _____
Property taxes	\$ _____
Travel	\$ _____
Utilities	\$ _____
Other _____	\$ _____
Major renovations & purchases (i.e.: appliances)	
_____	\$ _____
_____	\$ _____
_____	\$ _____

Schedule 6 SALE OF REAL ESTATE	
Include the Statement of Adjustments for <u>BOTH</u> the sale and purchase.	
Address	_____

Names of partners and % owned	_____
SIN # of partners	_____
Date Purchased	_____
Purchase price	\$ _____
Property transfer tax	\$ _____
Legal costs paid on purchase	\$ _____
Additions and/or major improvements	\$ _____
_____	\$ _____
_____	\$ _____
Date Sold	_____
Sale price	\$ _____
Legal costs paid on sale	\$ _____
Commission paid on sale	\$ _____
Other _____	\$ _____
Other _____	\$ _____
Other _____	\$ _____

Schedule 7 SALE OF INVESTMENTS (Not including investments held in your RRSP, TFSA or other registered plans)							
Option 1: Please provide the following documents for ALL NON-RRSP or NON-registered plans:							
(You will need to contact your broker to obtain the following information)							
1: December 31st investment statements							
2: Realized gain/loss report covering the period from Jan 1 to Dec 31							
3: Brokers' statement for both purchases and sale (only if realized gain/loss report is not available)							
Option 2: If the above information is <u>not</u> available, please provide information in the format below:							
Name of Stock	Purchase Date MM / DD / YY	Sale Date MM / DD / YY	US \$ (Y/N)	Shares Sold #	Sale Proceeds \$	Commissions \$	Cost of Shares \$
_____ / ____ / ____	_____ / ____ / ____	_____ / ____ / ____	_____	_____	_____	_____	_____
_____ / ____ / ____	_____ / ____ / ____	_____ / ____ / ____	_____	_____	_____	_____	_____
_____ / ____ / ____	_____ / ____ / ____	_____ / ____ / ____	_____	_____	_____	_____	_____