



**T1 PERSONAL INCOME TAX RETURN CHECKLIST**

**If any of the following information has changed (or if you are a new client) please provide the following:**

Name: \_\_\_\_\_ Spouse/Partner Name: \_\_\_\_\_

Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

Self: SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Spouse/Partner: SIN: \_\_\_\_\_ Birthdate: \_\_\_\_\_

(If we are not completing your spouse/partner's return) Spouse/Partner's Net Income: \_\_\_\_\_

Marital Status: Married      Widowed      Divorced      Single      Separated      Common-law

Children: Name                      SIN (If available)                      Date of Birth

<b>INCOME</b>			<b>IF YES PLEASE PROVIDE:</b>
Salary/employment income	Yes	No	T4 slips issued by employer
Pension/annuity income	Yes	No	T4A / T4A(P) / T4A(OAS) slips
Foreign pension income	Yes	No	Country, type (company/government), currency
RRSP/RRIF income	Yes	No	T4RSP / T4RIF slips
Interest/dividend/investment income	Yes	No	T5 / T5013 slips, details of other investment income
Trust/mutual fund income	Yes	No	T3 slips
Self-employment income (ie: rental, business)	Yes	No	Details of income and expenses for period. GST/HST remittance returns for period.
Universal Child Care Benefit income	Yes	No	RC62
Capital gains/losses from sale of stocks, mutual funds, bonds, real estate, etc.	Yes	No	1. Trading Summary for each brokerage account 2. Realized Gain/Loss Report 3. Monthly/quarterly statements showing transactions from January 1 to December 31. If you do not have statements, please provide cost and date of purchase, sale proceeds and date of sale.
Other income	Yes	No	Details or slips (Workers Compensation, Employment Insurance, etc.)
Sale of real estate including primary residence	Yes	No	Statement of adjustments on closing from law firm and accumulated cost of property.

DEDUCTIONS AND CREDITS			IF YES PLEASE PROVIDE:
RRSP contributions	Yes	No	Tax receipts – may include first 60 days of current year
Home Buyers Plan (HBP) or Lifelong Learning Plan (LLP)	Yes	No	Amount of any HBP or LLP repayment and statement from CRA
Union or professional dues	Yes	No	Tax receipts (if not listed on T4)
Child care/summer camp for your children	Yes	No	Official receipts
Child fitness/activity/art fees	Yes	No	Official receipts and total paid per child per year
Public transit pass expenses	Yes	No	Total for year & receipts
First-time home buyer tax credit	Yes	No	Date of when home was purchased
Moving expenses	Yes	No	Details – must move at least 40km closer to work
Investment income expenses	Yes	No	Interest expenses, fees, etc.
Employment expenses	Yes	No	Details – please provide T2200
Student loan interest	Yes	No	Tax receipt – Canada Apprentice Loans are now eligible
Tuition fees for self	Yes	No	T2202/T2202A
Tuition fees of dependent who wishes to transfer	Yes	No	T2202/T2202A signed by student + copy of student's tax return if not prepared by us
Medical expenses	Yes	No	Official receipts – contact your pharmacy or insurance provider for a summary for the year. As well, please provide a summary of any travel over 40 km one-way for medical purposes.
Charitable donations	Yes	No	Tax receipts
Political donations	Yes	No	Tax receipts

OTHER			IF YES PLEASE PROVIDE:
Do you have assets outside of Canada, including foreign stocks in excess of \$100,000 Canadian?	Yes	No	Details: A listing of all foreign owned assets during the year including value of assets.
Is there more tax information which you are still waiting for?	Yes	No	Details:

**If you are a new client, please provide us with your prior year tax return.**

As the information in this checklist does not address all income tax matters and is abbreviated for simplicity, please contact any of our staff below at 902 628 2242 for further information, details or clarification. Thank you.

*Troy Bradley, CPA, CA, CFP – Partner*  
*Neil Handrahan, CPA, CA – Partner*  
*Kimberley A. Norgaard, CPA, CA – Manager*  
*Ashley MacNevin, CPA, CA – Senior Accountant*  
*Matthew Ward, CPA, CA – Senior Accountant*  
*Rachel Murphy - 李佳颖, MBA, CPA, CMA, FRM –*  
*Accountant/Immigration Services*

*Kevin Bernard, BBA – Staff Accountant*  
*Tracy MacDonald – Senior Accounting Technician*  
*Carla Reid – Senior Accounting Technician*  
*Tara Cudmore, BBA – Office Manager*  
*Stephen Jordan – Accounting Technician*  
*Doug Smith – Accounting Technician*  
*Kim Anderson – Administrative Assistant*