

PERSONAL TAX CHECKLIST

INCOME SOURCES CHECKLIST			
Employment T4 or T4A slips	☐	RRSP, DOSO, ROO, RRIF	☐
Pension (T4/T4OAS/T4AP)	☐	Estates/Trusts/Mutual Fund	☐
Employment Insurance	☐	Universal Child Care (RC62)	☐
Interest/Dividends/Capital Gains	☐	Other:	☐
Other Investments T5013/T5008	☐	Other:	☐

TAX DEDUCTIONS CHECKLIST (with official receipts)			
RRSP Contribution	☐	Student Loan Interest Stmt.	☐
Union/Professional Dues	☐	Medical Expenses	☐
Child Care Expenses	☐	Disability Certificate (T2201)	☐
Child Sport/Recreation Fees	☐	Charitable Donations	☐
Moving Expenses	☐	Political Donations	☐
Accounting Fees	☐	Monthly Transit Passes	☐
Fees on Non-Reg. Investments	☐	First Time Home Buyer	☐
Investment Counsellor Fees	☐	Other:	☐
Tuition Fees	☐	Other:	☐

OTHER IMPORTANT DOCUMENTS CHECKLIST			
Notice of (Re)Assessment	☐	Tax Shelters	☐
Mutual Fund Invest Summary	☐	Home Buyers Plan (RRSP)	☐
Sale of Property - Details	☐	T2200 Employer Author. Exp.	☐
Sale of Real Estate Documents	☐	T1135 Foreign Property	☐
Sale of Shares/Investment Summ	☐	Other:	☐

OTHER IMPORTANT DOCUMENTS CHECKLIST			
Commission Expense	☐	Spouse's Income	☐
Automobile Expenses (if Eligible)	☐	Previous Partner's Income	☐
Alimony Paid or Received	☐	Prior year returns (new clients)	☐
Capital Gains Election (T664)	☐	Rent Receipts paid in Manitoba	☐
Dependent's Income	☐	Other:	☐
Foreign Income	☐	Other:	☐
Foreign Taxes Paid	☐	Other:	☐
List of Foreign Property Owned	☐	Other:	☐
Income Tax Instalments Paid	☐	Other:	☐
Rental Income and Expenses	☐	Other:	☐
Self-Employment Income and Exp	☐	Other:	☐

New Client Information:

- Date of birth _____
- Mailing address _____
- Telephone number _____
- Dependent's name and date of birth _____