

2008 Personal Tax Checklist

To assist us in the preparation of your 2008 T1 Income Tax Return, we have prepared the following tax checklist. Please use this list to assemble all the needed information and records that apply to your particular circumstances.



Client Name: _____

This section is for new clients or if your information has changed in the last year.

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 | Net Income (if any) |
|-------|-----|------------|---------------------|
|-------|-----|------------|---------------------|

| | | | |
|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

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/Home Buyer's Plan withdrawal
- T4RIF- RRIF Income
- Joint Election to Split Pension Income
- T4E - Employment Insurance Benefits
- T5007 - WCB Benefits/Social Services Benefits
- T4RCA - Retirement Income

- RC62 - Universal Childcare benefit

Other

- Alimony Received
- Taxable Child Support Received
- Scholarships / Bursaries
- Other - Specify _____

Investment

- T3, T5, T4PS - Interest and Dividends
- T5008 - Statement of Security Transactions
- Interest on Tax Refund(s) (from NOA)
- T600 - Canada Savings Bonds
- T3 - Mutual Fund Income
- Foreign Income
- Annuities
- Rental Income (summary schedule)
- Summary of Investment Contract Holdings
- T5013 - Limited Partnership Income (Loss)
- Capital Gains / Losses (summary schedule)

Business

- Self - Employed 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)
- Tax Credit for Children
- Disability Deductions
- T2202 - Tuition Fees / Education/Textbook Credit
- T2202 - Tuition Fees / Education/Textbook Credit for Dependant -
Dependants Net Income \$ _____
- Interest Paid on Student Loans
- Public transit passes amount
- Children's Fitness amount
- Medical Receipts
- Charitable Donations
- Dependant Data (For GST Credit, Child Tax Benefit, Child
Tax Credit and Child Fitness Amount)
- Adoption Expenses
- Caregiver amount (Full Details required)
- Apprentice Job Creation Credit

Other Credits

- Political Contribution Receipts
- Rent / Property Tax Paid

Other Information

- 2007 Notice of Assessment
- Summary of 2008 Instalment Payments
- Details on Foreign Property held in 2007 where total costs
exceeded \$ 100,000 Canada

Other Deductions

- RRSP Receipts
- Union, Professional Dues
- Alimony Paid
- Deductible Child Support Paid
- Safety Deposit Box Charges
- Interest and Carrying Charges on Investments
- Investment Counsel and Accounting Fees
- Employment Expenses (summary)
- T2200 - Declaration of Conditions of Employment
- Deductible legal fees
- TL2 - Claim for Board and Lodging Expense
- Child Care Expenses (Full Details Required)
- Tradespersons Tools Expenses
- Moving Expenses (Full Details Required)
- Allowable Business Investment Loss
- Restricted Farming Losses Carry Forward
- Capital Losses Carry Forward
- Non - Capital Losses Carry Forward
- Attendant Care Expenses
- Limited Partnership Losses of Other Years
- Employment Insurance Benefit Repayments

Are you a Canadian citizen: YES NO

Are you a citizen of any other country: YES NO If yes, please specify: _____

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 for the National Register of Electors.

Taxpayer Yes / No **Spouse** Yes / No

Please use this space to provide any additional information or notes.
