

Currie Accounting Services Ltd.

4 - 851 Lagimodiere Blvd., Winnipeg, Manitoba R2J 3K4

T.: (204) 231-0947 F.: (204) 231-0948 E.: info@currieaccounting.com W.: www.currieaccounting.com

Personal Tax Information Checklist

1. Personal Information:

Name:

(First name, middle initial, surname)

Address: _____

City/Prov.:

Postal Code:

Phone (Home):

Phone (Work):

E-Mail:

Fax:

SIN:

Birth date:

(dd/mm/yyyy)

Marital Status: _____

Occupation:

Did you move
during the year?

(yes/no)

2. Spouse (including common-law partner):

Name:

Birth date:

(dd/mm/yyyy)

SIN: _____

Net Income:

(Line 236)*

If marital status changed during the year, please indicate date of change:

(dd/mm/yyyy)

* Please provide income and deductions information only if Currie Accounting Services Ltd. is not preparing the spouse's tax return.

3. Dependants (children, parents, and others dependent on you for financial support):

- 1.
- 2.
- 3.
- 4.

Please provide dependant's name, relationship to you, date of birth (dd/mm/yyyy), SIN, and net income. Attach additional sheets if necessary. Please indicate whether dependant lived with you during the year.

For any dependant who is infirm, please provide the nature of the infirmity.

For more information regarding the Caregiver Tax Credit, please refer to this website's **Tax Tips** page.

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4. T-Slips (The standard forms on which Canadian income is reported):

Employment income:

Employment / commission / director's fees income	T4, T4A	<input type="checkbox"/>
Employee profit sharing	T4PS	<input type="checkbox"/>
Research grant	T4A	<input type="checkbox"/>
Retirement allowance(s)	T4A	<input type="checkbox"/>
Royalties from work or invention	T5	<input type="checkbox"/>
Wage-loss replacement plan benefit	T4A	<input type="checkbox"/>
Income from employment in the U.S.A.	W2 and 1040	<input type="checkbox"/>
Income from employment in foreign countries*	-	<input type="checkbox"/>
We also recommend that you bring along your last pay stub of the year from each employer	-	<input type="checkbox"/>

Pension / retirement income:

Pension / annuity income	T4A, T4A(OAS), T4A(P)	<input type="checkbox"/>
Income from RRSPs and/or RRIFFs	T4RSP, T4RIF	<input type="checkbox"/>
Foreign pension*	-	<input type="checkbox"/>

Other income sources:

EI benefits	T4E	<input type="checkbox"/>
Income from RESP	T4A	<input type="checkbox"/>
Scholarships, bursaries, and fellowships	T4A	<input type="checkbox"/>
Social assistance payments	T5007	<input type="checkbox"/>
Workers' compensation benefits	T5007	<input type="checkbox"/>
Support payments received (Copy of agreement required)	-	<input type="checkbox"/>
Other foreign income*	-	<input type="checkbox"/>
Rental income / expenses	-	<input type="checkbox"/>
Business / professional income	-	<input type="checkbox"/>

* If you paid foreign income tax, please bring proof of payment.

If you have other sources of income and are not sure whether they must be reported, please consult us.

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5. Investments (income and expenses):

Investment income:

Interest and dividends	T5	<input type="checkbox"/>
Mutual funds and other trusts	T3	<input type="checkbox"/>
Partnership income	T5013	<input type="checkbox"/>
Tax shelters	T101, T5013	<input type="checkbox"/>
Purchase and sale of securities	T5008	<input type="checkbox"/>

Investment expenses:

Carrying Charges (paid to earn income from investments) such as:

Accounting fees	<input type="checkbox"/>
Investment counsel and investment management fees	<input type="checkbox"/>
Safety deposit box charges	<input type="checkbox"/>

Interest on money borrowed for investment purposes:

Interest, dividends and royalty income	<input type="checkbox"/>
Tax shelters, rental, resource and leasing property	<input type="checkbox"/>
Limited partnership, or a partnership in which you are not an active partner	<input type="checkbox"/>

6. Capital Gains and Losses:

The disposal of securities or other capital property (such as stocks, bonds, and mutual funds), real estate, or interest in foreign property may result in capital gains or losses.

Please consult us for information regarding the tax treatment of such gains and losses.

7. Foreign Property:

If, at any point in the year, foreign property you owned or your share of foreign property in which you had an interest had a cost of more than CAN\$100,000, a completed Form T1135 will have to be submitted.

Please consult us for information regarding shares of non-resident corporations, and non-resident trusts.

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8. Deductions and Tax Credits:

Please provide us with all your receipts and applicable documentation so that we can ensure that you get every tax deduction and credit to which you are entitled.

Many common tax savings are listed below:

Age amount (line 301)		<input type="checkbox"/>
Spouse or common-law partner amount (line 303)		<input type="checkbox"/>
Eligible dependant amount (line 305)	Schedule 5	<input type="checkbox"/>
Child tax credit (line 367 - provide no. of eligible children)		<input type="checkbox"/>
CPP contributions (line 308)	T4 Slips	<input type="checkbox"/>
EI premiums (line 312)	T4 Slips	<input type="checkbox"/>
Canada employment amount (line 363)		<input type="checkbox"/>
Public transit tax credit (line 364)		<input type="checkbox"/>
Children's fitness tax credit (line 365)		<input type="checkbox"/>
Home renovation expenses (line 368)	Schedule 12	<input type="checkbox"/>
Home buyers' amount (line 369)		<input type="checkbox"/>
Pension income amount (line 314)		<input type="checkbox"/>
Disability amount (for self) (line 316)		<input type="checkbox"/>
Interest paid on student loans (line 319)		<input type="checkbox"/>
Tuition, education, and textbook amounts (line 323)	Schedule 11	<input type="checkbox"/>
Tuition, etc. amounts transferred from a child (line 324)		<input type="checkbox"/>
Amounts transferred from spouse or common-law partner	Schedule 2	<input type="checkbox"/>
Medical expenses (line 330)		<input type="checkbox"/>
Tools expenses (for tradespersons)		<input type="checkbox"/>
Child care expenses (for children 16 and younger)		<input type="checkbox"/>
Charitable donations and government gifts (lines 340, 349)		<input type="checkbox"/>
Contributions to a federal or provincial political party		<input type="checkbox"/>
Moving expenses (some restrictions apply)		<input type="checkbox"/>

Other documentation that may enable us to better help you:

Property tax and/or rent paid may result in eligibility for provincial tax credits.

"Notice of Assessment" from previous year and any other correspondence from the CRA.

Recent CRA Statement of Account indicating income tax installments paid during the year.

Any other documentation you think may assist in the substantiation of claim eligibility.