

Personal Tax Checklist

1. Please confirm the following information

Names of all the family members who's returns are to be prepared:

Mailing Address (if changed):

For Self and Spouse or Common Law Partner

Telephone Number:

Business Number:

Email Address:

Date of Birth:

S.I.N.

Marital Status:

Canadian Citizen:

Children:

Child Name

Date of Birth

SIN

Net Income

Post-Secondary?

Do you authorize the Canada Revenue agency to give your name, address, date of birth and citizenship to Elections Canada for the National Register of Electors? _____ (Beck Ltd. Default is Yes.)

Do you hold foreign assets in excess of \$100,000 Yes or No

2. Please include the following:

- Notice of Assessment (last year's)
- Copy of (last year's) Income Tax Return [if we did not prepare it]

2. Please include the following: [that apply to your tax year]

Information Slips:

- | | |
|--|---|
| <input type="checkbox"/> T3 – Trusts and Mutual Funds | <input type="checkbox"/> T5 – Dividends and Interest |
| <input type="checkbox"/> T4 – Employment | <input type="checkbox"/> T2202A – Tuition fees |
| <input type="checkbox"/> T4A – Pension, Scholarships | <input type="checkbox"/> T5013 – Partnership Income |
| <input type="checkbox"/> T4AP – CPP benefits received | <input type="checkbox"/> Self-Employment Income |
| <input type="checkbox"/> T4(OAS) – Old Age Security Received | <input type="checkbox"/> RRSP Contributions/withdrawals |
| <input type="checkbox"/> T4RSP, T4RIF, T4PS – RRSP and RRIF Income | <input type="checkbox"/> RESP Withdrawals |
| | <input type="checkbox"/> T4E – Employment Insurance |
| | <input type="checkbox"/> Quebec Relevé Slips |
| | <input type="checkbox"/> Union/Professional Dues |
| | <input type="checkbox"/> Interest on Student Loans |
| | <input type="checkbox"/> Deemed interest benefits |

Summarized Receipts:

- Home Buyers Plan
- Child Care Expenses
- Moving Expenses
- Medical/Attendant Expenses (annual summary available at pharmacy)
- Charitable Donations
- Political Contributions
- Alimony/Child Support Paid
- Rent/Property Taxes Paid
- Investment management fees

(Excel schedules available if needed)

- Rental Property Income and Expense Summary
- Business Income and Expense Summary
- Farming Income and Expenses
- Foreign Income and Taxes Withheld
- Summary of sales of Investments (cost and proceeds)

**If you sold a house, including your principal address, we will require the legal documents that pertain to the sale.

Principal Residence Detail Worksheet:

Street address: _____

City: _____ Province: _____ Postal Code: _____

Year of Acquisition: _____ (Year Purchased)

Proceeds of Disposition: _____ (Sale Price)