



### 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 review this list for all **possible** applicable items relating to your particular circumstances.

Client Name: \_\_\_\_\_

*This section for new clients or if information has changed*

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	Relationship	Net
Income (if any)				

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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 of the National Registrar of Electors

Taxpayer	Yes /	No	Spouse	Yes /	No
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## 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  
T4RIF – RRIF Income  
T4E – Employment Insurance Benefits  
T5007 – WCB Benefits / Social Services Benefits  
T1137 – Home Buyers Plan  
T4RCA – Retirement Income

### Other

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

### Investment

T3, T5, T4'S – Interest and Dividends  
T5008 – Statement of Security Transactions  
Interest on Tax Refunds(s)  
T600 – Canada Savings Bonds  
T3 – Mutual Fund Income  
Foreign Income  
Annuities  
Rental Income (Full Details Required)  
Summary of Investment Contract Holdings  
T5013 – Limited Partnership Income (Loss)  
Capital Gains / Losses (Full Details Required)

### Business

Self –Employment 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)  
Disability Deductions  
T2202 - Tuition Fees / Education Credit for Dependant  
Dependants Net Income \$ \_\_\_\_\_  
Medical Receipts  
Charitable Donations  
Attendant Care Expenses  
Limited Partnership Losses of Other Years

### Other Items

Political Contribution Receipts  
Capital Losses Carry Forward  
Allowable Business Investment Loss  
Employment Insurance Benefit Repayments  
Dependant Data (GST Credit and Child Tax Benefit)  
T2200 – Declaration of Conditions of Employment  
Loss Carry Forward Information

### Other Deductions

RRSP Deductions  
Union / Professional Dues  
Alimony Paid  
Deductible Child Support Paid  
Safety Deposit Box Charges  
Interest Paid on Student Loans  
Interest and Carrying Charges on Investments  
Investment Counsel & Accounting Fees  
Employment Expenses (Full Details Required)  
Deductible Legal Fees  
Child Care Expenses (Receipts Required)  
Moving Expenses (Full Details Required)  
TL2 – Claim for Board and Lodging

### Expenses

Restricted Farming Losses Carry Forward  
Prior year Notice of Assessment  
Instalment Payments for current year  
Details on Foreign Property held (CND \$ 100,000.00)  
Capital and Non-Capital losses carry forward

### IMPORTANT QUESTIONS FOR ELIGIBILITY OF TAX CREDITS

- 1a. How many individuals live in your home, what are their ages and relationship to you?
  - b. Has there been any changes to the number or status of any members in your household?
- 2a. Whom do you support financially; Do you make support payments?
  - b. Did you pay for an attendant, childcare provider or any retirement or nursing home costs?
3. Does anyone living with you have a mental or physical infirmity or disability?
4. Did your marital status change during the year?
5. Did anyone in your family arrive in or leave Canada?
6. Did anyone in your family pay for medical expenses this year; other than MSP?
7. Did anyone in your family attend a post secondary institution, part time or full time?
8. Did anyone in your family pay **private** extended health or dental premiums?
9. Did anyone in your family make donations or gifts to charities?