Barnett & Associates Professional Corporation

2015 PERSONAL INCOME TAX CHECKLIST

1. Personal Information: *(Required for NEW clients. Existing clients, please identify changes only.)*

Name: ______________________ **S.I.N.:** ______________

Address: ______________________

Date of Birth: (yyyy-mm-dd) ______________ **Canadian Citizen:** (please circle) Yes or No

Phone: ______________ **Email:** ______________

Marital Status: (please circle) Single Married Common-Law Separated Divorced Widowed

Date Changed: (2015-mm-dd) ______________

Spouse's Information: (only provide if we are NOT preparing the return) **S.I.N.:** ______________

Name: ______________ **Date of Birth** **(yyyy-mm-dd) :** ______________

Net Income: $ ______________

Dependants:

Name	Birth Date	S.I.N.	Net Income
			$
			$
	(yyyy-mm-dd)		$

2. Please ensure the following information is forwarded as soon as possible:

General

- ☐ 2014 Notice of Assessment from the CRA
- ☐ Instalment payments made during the year
- ☐ Foreign assets totalling $100,000 or more **(T1135)**. Non-disclosure may result in penalty up to $2,500

Income Slips

- ☐ Employment and other income **(T4, T4A)**
- ☐ Employment Insurance **(T4E)**
- ☐ Pension income **(T4A(P), T4RIF, T4RSP)**
- ☐ Partnership Income **(T5013)**
- ☐ Old Age Security **(T4OAS)**
- ☐ Universal Child Care benefit **(RC62)**
- ☐ Investment Income **(T5, T3)**
- ☐ Social Assistance/Worker's Compensation **(T5007)**
- ☐ Details of the sale of securities such as stocks and bonds, mutual funds, etc. **(T5008)**
  ► provide details of original cost, proceeds and expenses of disposition (eg. trading summary from broker)

Deductions/Credits - RECEIPTS REQUIRED

- ☐ RRSP contributions
- ☐ Child care receipts and expenses
- ☐ Medical, dental, prescription expenses
- ☐ Fitness and art program receipts for children
- ☐ Moving expenses (moved over 40km)
- ☐ Property taxes/Rent receipts (including students)
- ☐ Tuition fees/Education amount (**T2202A** from Univ./Col.)
- ☐ Charitable Donations/ Political contribution receipts
- ☐ Student loan interest
- ☐ Public Transit passes
- ☐ Union and professional dues
- ☐ Disability tax credit claims **(T2201)** if first year claiming

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3. Deductions - Employees

- ☐ Declaration of conditions of employment **(T2200 required)** completed by employer
- ☐ Home office expenses (indicate the total area of home and the area used for workspace)
  - ► details of mortgage interest, insurance, property taxes, repairs, utilities
- ☐ Vehicle expenses (if claiming against employment income, need completed **T2200**)
  - ► total kilometres driven, business & personal
  - ► expenses incurred for gas, maintenance, insurance, license, interest, parking
  - ► new vehicle purchase invoice/lease agreement and financing papers

4. Self Employment Income

- ☐ Total sales revenue for the year with & without HST
- ☐ Direct expenses listed by category for the year (on Excel spreadsheet or other program)
- ☐ Home office expenses (indicate the total area of home and the area used for workspace)
  - ► details of mortgage interest, insurance, property taxes, repairs and utilities
- ☐ Telephone, cell & land lines, internet cost
- ☐ Vehicle expenses
  - ► total kilometres driven, business and personal
  - ► expenses incurred for gas, maintenance, insurance, license, interest, parking
  - ► new vehicle purchase invoice/lease agreement and financing papers
- ☐ HST forms to complete with access codes

5. Rental Properties

- ☐ Address and number of units
- ☐ Rental income collected
- ☐ Rental expenses listed by category of expense (mortgage interest, taxes, utilities, maintenance, insurance, etc.)
- ☐ New Property purchase details provided by lawyer
- ☐ Property sold details provided by lawyer

The CRA requires that all "Deductions/Credits" (sec. 2 above) be verified against original receipts.

**Please forward your pertinent information to our office as soon as you have it assembled.
In order to ensure an April 30th (or June 15th) filing, we need to receive all of your information in our office at least two weeks prior to the filing deadline.**

Tax returns will be e-filed upon receipt of:
- signed CRA forms;
- payment of our fee for tax preparation services.