

ASSOIGNON & COMPANY INC.

Professional Accountant

PERSONAL INCOME TAX CHECKLIST

PERSONAL INFORMATION

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

Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Home / Cell Phone: \_\_\_\_\_ Birth Date: \_\_\_\_\_

SIN: \_\_\_\_\_ Marital Status: \_\_\_\_\_

DEPENDENTS

Name: \_\_\_\_\_ SIN: \_\_\_\_\_ Birth Date: \_\_\_\_\_ Net Income: (if applicable) \_\_\_\_\_

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

INCOME

Personal Income

- T4 / T4A - Salaries and Employment Income
- T4A (P) – CPP Benefits
- T4 (OAS) – Old Age Security Benefits
- T4A – Other Pensions or Superannuation
- T4RIF – RRIF Income
- T4E – Employment Insurance Benefits
- T5007 – Social Services Benefits
- RC62 – Universal Child Care Benefit
- T4RSP – RRSP Income
- Other Employment Benefits

Investment Income

- T3 / T5 / T4PS – Interest & Dividends
- T5008 – Statement of Security Transactions
- Interest on prior year tax refund
- Capital Gain / Losses
- T3 – Income from Mutual Funds
- Annuities
- Rental Income (please also complete our Rental Income Summary form)
- T5013 – Net Partnership Income / Loss on Limited Partnerships

SALE OF REAL ESTATE

All sales of real estate property *must* be reported to CRA on your personal income tax return, including the sale of your primary residence. Please provide the following for each real-estate transaction over the previous year:

Original purchase price \$ \_\_\_\_\_ Sale Proceeds \$ \_\_\_\_\_

Date of purchase \_\_\_\_\_ Date of Sale \_\_\_\_\_

Is this your primary residence?  YES  NO

- Attached lawyer's / Notary's statement of adjustments for the original purchase and the sale
- Attached details on adjustments to ACB – major improvements, realtor's commissions, etc

OTHER INCOME

Alimony received      Taxable child support received      Scholarships/Bursaries      Other \_\_\_\_\_

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**BUSINESS INCOME**

Business Income/Expenses      Farming/Fishing Earnings      Professional Income/Expenses      Other *(Pls complete relevant forms)*

**NON-REFUNDABLE CREDIT**

Married amount - Spouse's Net Income \$  
Equivalent to married amount  
Disability Deductions (Full details required)  
Medical Receipts

T2202 - Tuition Fees/Education Credit  
Interest Paid on Student Loans  
Charitable Contributions

**OTHER DEDUCTIONS**

RRSP Contributions  
Spousal Support payments  
Interest Carrying Charges on investments  
Employment expenses  
*(Please include Form T2200 Declaration of Conditions of Employment)*

Union & Professional Dues  
Medical/Attendant Care expenses  
Investment Counsel & Accounting fees  
Child Care expenses *(Full details required)*  
Moving expenses *(Full details required)*

**OTHER INFORMATION**

Installment Payments \$  
Details on Foreign Property held where total cost exceeding \$100,000 CDN (This includes foreign shares in Canadian Trading Accounts)

**Please attach additional pages and forms to provide any supplementary information and relevant explanations.**

**This list includes some of the more common income, deduction and tax credits. Everyone's tax situation is unique so please don't hesitate to include additional notes or contact us with any questions.**