

State of the Art Accounting Ltd.

Checklist – Personal Income Tax Checklist

Previous Client? Yes No

Client Name: _____
Mr Mrs Ms Last Name Given Name Initial

Email: _____

Current Address _____ No change

Phone No (604) _____ Birth Date _____

Marital Status: Single Married Separated Divorced Widowed

Spousal and/or Dependents Information (if applicable)

Spouse Name _____ Spouse's SIN _____

Spouse's Date of Birth _____ Net Inc. _____

Dependent Name _____ Dependent's SIN _____

Dependent's Date of Birth _____ Net Inc. _____

Will we do spouse's/dependent's return? Yes No

Information Needed to Prepare your Return

Personal

- Notice of Assessment 2004
- T4, T4A Wages, salaries and commissions
- T4A (P) Canada Pension income or T4A (OAS) Old Age Pension or Foreign Pensions?
- T4RSP RSP Income or T4RIF RRIF Income or T4RCA Retirement income
- T4E Employment insurance benefits
- T5007 WCB or social services benefits

Financial

- T3, T5 Mutual fund, Investment income and Dividends interest CSB
- T600 Canada Savings Bonds and T5013 Limited Partnership income
- Safety Deposit box? If so, how much? _____
- Taxable Capital Gains Proceeds and Original Cost
- Rental Income - Detailed listing for income and expenses
- Self Employment Details on income and expenses
Employment Expenses/Declaration of Conditions of Employment T2200

Other Income/Deductions:

- RRSP contribution receipts Child care expenses Alimony received Lifelong Learning
- Donations Medical expenses Home buyers plan Tuition/Education T2202
- Union/professional Dues T2200 Declaration of Conditions Employment Deductible Accounting Fees
- Moving expenses Interest on Investments Deductible Accounting Fees
- Other _____

Details of installment payments: _____

Other comments? _____ E-file? Yes No