

**PERSONAL INCOME TAX CHECKLIST**

Please call if you have questions and when you are ready to make an appointment to come in

**Enter information in the blue boxes & bring slips/receipts**

Name:	
Address:	
Do you rent or own your residence?	
Change in marital status? -Common law questionnaire. Y/N	
<b>Tax slips and Income - check if applicable</b>	
First Home Savings Account open? Contributions?	
T4 – employment income	
T4A – contract, pension, annuity & miscellaneous income	
T4E – employment insurance & other benefits	
T4A(P) – Canada Pension Plan	
T4A(OAS) – Old Age Security	
T4RIF – RRIF income	
T4RSP – RRSP withdrawals	
T5007 – Workers Compensation & other benefits	
Stock options vested/exercised?	
<b>Investment income &amp; expenses? - check if applicable</b>	
T3's – Mutual funds and trusts (March 31)	
T5 – Investment (Interest/dividend) income (Feb28)	
T5008 –Securities transactions (stocks, bonds, mutual funds)	
T5013 – Partnership income (March 31)	
T600 – Canada Savings Bonds	
Brokerage account statements for the year (all)-Do NOT include RRSP, RESP, RRIF, TFSA	
Interest on investment loans	
Do you own Tbills, strip bonds, CSB's, long term bonds?	
Other investment income or expenses	
Accounting, management, investment counsel fees	
<b>Did you dispose of, or change use of, ANY property?</b>	
<b>Other income? Check if applicable</b>	
Alimony/Child Support/Maintenance	
Self employment income-Please use Lyons Excel template to summarize income and expenses	
If you have foreign source income, or ANY assets/accounts outside of Canada please discuss with Belinda	

[In Excel click here to send your documents securely](#)

Current Email:	
Current phone:	
Change of dependants?	
<b>Employee home office amounts (T2200 signed by employer)</b>	
Rent paid	
Maintenance expenses	
Hydro	
Gas	
Water	
Other (provide details separately)	
<b>Commission Employees (T2200 signed by employer)</b>	
Insurance	
Property taxes	
<b>Business use of home</b>	
Mortgage Interest paid	
Office Sq Ft/M	
Home Sq Ft/M	
<b>Employment expenses? (T2200 signed by employer)</b>	
<b>Trusts</b>	
Are you party to any trust accounts, including bare trust?	
<b>Auto expenses? (business or employee with T2200)</b>	
Business kms / Total Kms	
Gas & oil	
Insurance & registration	
Loan interest	
Lease payments	
Maintenance & repairs/BCAA	
Lease start date	
Purchase date	
MSRP of new auto (lease or purchase)	
Trade in/Sale price	

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CAD Resident all year? (Y/N)	
CAD Citizen? (Y/N)	
<b>Rental income? (please provide details by property)</b>	
Co-owned? (Y/N)	
<b>Address(es)</b>	
Rent collected	
Advertising	
Insurance	
Maintenance & repairs	
Mortgage interest	
Property taxes	
Utilities	
Travel (if own more than one property)	
Office expenses & supplies	
Short term or long term rental? Converted?	
Suite in home? Y/N	
Suite Sq Ft/M	
<b>Other expenses ? Check if applicable</b>	
Charitable Donation (up to 5 years)	
Child care receipts (name/address/SIN of payee)	
Tuition (T2202)	
Medical/Dental receipts	
Moving expense receipts (40km or more closer to work/school)	
Professional/union dues receipts	
Home accessibility changes (seniors 65+)	
Qualifying Educator expenses (Max \$1,000)?	
<b>IF YOU HAVE A LOT OF RECEIPTS PLEASE ASK FOR OUR EXCEL TEMPLATE TO LIST THEM</b>	
<b>Miscellaneous - Check if applicable</b>	
✓	Last tax year notice of assessment
	February notice showing total instalments paid
	Volunteer firefighter or search and rescue?
	Does anyone in your household live with a disability?
	Is your home address different from your mailing address?