Munro & Accounting Tax CPA

Gloria Munro CPA
T 604.434.6620
F 1-888-603-4028
gloria@munrocga.com

North Road Plaza
#303-9940 Lougheed Highway
Burnaby, BC V3J 1N3

www.munrocga.com

Personal Income Tax Checklist

To assist in the preparation of your Personal Income Tax Return, please complete this form and attach the supporting documentation.

In the event of an audit, the onus of proof is on the taxpayer; unsupported claims may be denied.

For information on Audits, refer to Understanding Tax: Audits.

For information on Personal Tax, refer to Understanding Tax: Personal Tax.

Name _____

New Client or New Information

- Street _____ Phone _____
- City _____ Postal _____ Cell _____
- Email _____ Birthday (m/d/y) / /

Marital Status

- Married or Common-Law
- Single or Widowed
- Separated or Divorced
- Date of status change / /

- Spouse
- Birthday (m/d/y) / /
- SIN: - -
- Net income

Dependents

Name	Birthday (m/d/y)	SIN	Gender	Net Income
		- -	M F	$
		- -	M F	$
		- -	M F	$

Other

- Please provide any changes to your address or contact information Y N
- Are you a Canadian citizen? Y N
- Release information to Electons Canada? Y N
- Are you registered for DirectDeposit? Y N
- Did you hold any foreign property in the year, where the total cost exceeded $100,000 CDN? Y N

Documents

- Notice of Assessment
- Summary of instalment payments and receipts

New Clients

- Tax return - last year filed
- Notice of Assessment

Income

Personal

- T4 – Employment Income
- Other Employment Income (Tips, benefits)
- T4A (OAS) – Old Age Security
- T4A (P) – CPP Benefits
- T4A – Pension and other income
- T4E – Employment Insurance benefits
- T5007 – Social Assistance/WCB
- T4 RSP – RRSP Income
- T4 RIF – RRIF Income
- Self-Employed Income (use checklist)
- Alimony Received $

Investment

- T3 – Estate/Trust/Mutual Funds Income
- T5/T3 – Interest and Dividend Income
- T600 – Canada Savings Bonds
- T5008 – Statement of Security Transactions
- T5013 – Limited Partnership Income
- Capital Gains/Losses
- Rental Income (use checklist)
- Foreign Income

Munro & Accounting Tax CPA

Gloria Munro CPA
T 604.434.6620
F 1-888-603-4028
gloria@munrocga.com

North Road Plaza
#303-9940 Lougheed Highway
Burnaby, BC V3J 1N3

www.munrocga.com

Personal Income Tax Checklist _ continued

Sale of Principal Residence

- [ ] Year at purchase
- [ ] Proceeds of Disposition (sales price) $
- [ ] Percentage of ownership %
- [ ] Was the property your principal residence for all the years it was owned? Y N

Deductions

- [ ] RRSP Contribution Receipts
- [ ] Union, Professional Dues
- [ ] Alimony Paid $
- [ ] Deductible Child Support Paid $
- [ ] Interest and Carrying Charges on Investments
- [ ] Investment Counsel and Accounting fees
- [ ] Employment Expenses (use checklist)
- [ ] Deductible Legal Fees
- [ ] Child Care Expenses
- [ ] Moving Expenses
- [ ] Allowable Business Investment Losses
- [ ] Capital Loss Carry Forwards
- [ ] Non-Capital Loss Carry Forwards
- [ ] Limited Partnership Losses of Other Years

Tax Credits

- [ ] T2201 – Disability Deduction
- [ ] T2202 – Tuition Fees/Education Credit

  (For transfer from dependant, complete reverse of slip.)
- [ ] Interest Paid on Student Loans
- [ ] Medical Receipts
- [ ] Attendant Care Expenses
- [ ] Charitable Donations
- [ ] Political Contribution Receipts

Keeping Records

Generally you must keep your records for six years from the end of the taxation year to which they relate. For more information about keeping records, refer to **Understanding Tax: Record Retention**.

Notes and Questions