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

www.munrocga.com

## Personal Tax Checklist - Deceased Persons

To assist in the preparation of the 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 tax returns, refer to <u>Deceased Persons</u>.

www.mamooga.oom	Name of the Deceased				
	Date of Birth (m/d/y)	Date of Death (m/	d/y)		
nrocontativo	No. 11	Dis			
presentative	Name	Phone			
of the	Email	Cell			
Deceased	Relationship to the Deceased				
Marital	Married or Common-Law	Spouse			
Status	Single or Widowed	Birthday (m/d/y)	1 1		
	Separated or Divorced	<u>SIN:</u> -	<u>-</u>		
	Date of status change / /	Net income			
Dependents	Name Birthda	ıy (m/d/y) SIN	Gender Net Income		
			M F \$		
			M F \$		
			M F \$		
Other					
Other	Was the Deceased a Canadian citizen?  Y N				
	Was the Deceased disabled?  Y N				
	Has direct deposit information previously been supplied to CRA? Y N				
	Did the Deceased hold any foreign propert	y in the year, where the total cost e	xceeded \$100,000 CDN? Y		
Documents	Tax return - last year filed	Will/Affadavit			
	Notice of Assessment for same	List of Assets + L	List of Assets + Liabilities (from lawyer)		
	Tax instalments paid, if any	Letters Probate	· · · · · · · · · · · · · · · · · · ·		
	Banking records for estate account	Death Certificate	Death Certificate		
Income	Personal	Investment			
THEOME	T4 - Employment Income	_	T3 – Estate/Trust/Mutual Funds Income		
	Other Employment Income		T5/T3 – Interest and Dividend Income		
	T4A (OAS) – Old Age Security		T600 – Canada Savings Bonds		
	T4A (OA3) - Old Age Security  T4A (P) - CPP Benefits		T5008 – Statement of Security Transactions		
	T4A - Pension and other income		T5013 – Limited Partnership Income		
	T4E – Employment Insurance benefits		Capital Gains/Losses*		
	T5007 – Social Assistance/WCB		Rental Income (use checklist)		
	T4 RSP – RRSP Income	<u> </u>	Taxable Child Support \$		
	T4 RIF - RRIF Income		Scholarships/Bursaries \$		
	Self-Employed Income (use checklist)	Outotal only of Dulis			
	Alimony Received: \$				
	y 1100011041 W				



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Deemed	Year at purchase			
Disposition	Assessed value \$			
of Principal	Percentage of ownership %			
Residence	Was the property the deceased's principal residence for all the years it was owned? Y N			
l				
Deductions	RRSP Contribution Receipts	Deductible Legal Fees		
	Union, Professional Dues	Child Care Expenses		
	Alimony Paid \$	Moving Expenses		
	Deductible Child Support Paid: \$	Allowable Business Investment Losses		
	Interest and Carrying Charges on Investments	Capital Loss Carry Forwards		
	Investment Counsel and Accounting fees	Non-Capital Loss Carry Forwards		
	Employment Expenses (use checklist)	Limited Partnership Losses of Other Years		
		Employment Insurance Benefit Repayments		
		_ <del>_</del>		
Tax	T2201 – Disability Deduction	Attendant Care Expenses		
Credits	T2202 – Tuition Fees/Education Credit	Charitable Donations		
	(For transfer from dependant, complete reverse of slip.)	Political Contribution Receipts		
	Interest Paid on Student Loans	Working Opportunity Fund		
	Medical Receipts	Transit Passes		
Keeping	Generally you must keep your records for six years from the end of the taxation year to which they relate.			
Records	For more information about keeping records, refer to <b>Understanding Tax: Record Retention</b> .			
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Notes and				
Questions				