

# BOOKS BY KRISTI

## PERSONAL TAX CHECKLIST

Bring all items that apply to your situation

- Copy of previous year Notice of Assessment or (RE)Assessment from Federal Government
- Copy of last years' tax return in pdf or paper

Are you a **first time client**? If so, please bring:

- SIN# for all adults in the family
- Date of birth (MO/DAY/YEAR) for all members of the family including children
- Current address
- Home phone number
- E-mail address (for correspondence between you and I)
- Martial status (married, common-law, single, divorced, widowed, separated).

Common-law is defined as living together (but not married) for at least 12 months or living together and taking care of a child (less than 12 months). Separated is defined as living apart from your spouse for at least 90 days.

Has there been any **major changes in your life**? If yes, please tell us because it may be relevant to your tax situation (for example, change in martial status, became parents, moved, became a Canadian citizen, purchased a house or started renting, started investing, started a new job or new business, became disabled, retired, significant increase or decrease in income, etc)

If you are not sure whether you qualify for something or not sure how to answer, just ask me and we'll discuss it together.

Part A: Were you an **employee** for part or all of this year? If yes, you will need the following:

- T4 slips (from your employer)
- Union dues or professional fees paid for employment

Part B: Under conditions of your employment, did you have to pay any **employment expenses**? If yes, let me know and I will tell you what to bring.

Part C: Did you receive a **T4A**? If yes, Please bring it with you. Did you receive self-employed income? If so, please ask for my business checklist for unincorporated companies.

Part D: Do you have any **investments** (mutual funds, stocks, interest income, etc.)? If yes, please bring:

- T5 slips from investment company or bank
- Summary of transactions from your broker
- Safety deposit box charge from bank
- Did you take out a loan to purchase NON-RRSP investments? Please bring documentation regarding the loan from the bank (interest paid and what type of income does your investments produce (dividends, capital gains, interest, etc))

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Part E: **Trusts? Did you receive a T3?** If yes, please bring:

- T3 slips from trusts

Part F: **Retired?** If yes, please bring:

- T4A(OAS) slips for old age security

Part G: Have a **pension?** If yes, please bring:

- T4A(P) slips for pension benefits
- T4A slips for pensions or annuities

Part H: Received **government assistance** this year? (EI benefits, Workers Comp, etc) If yes, please bring:

- T4E EI Benefits received (from Federal Government)
- T5007 slip for WCB/Social Assistance payments

Part I: Did you contribute or withdrawal from/to an **RRSP?** If yes, please bring

- RRSP contribution slips
- T4RSP slips for withdrawal of RRSP funds

Note: If you contributed or made a withdrawal from a TFSA, I *don't* need this paperwork.

Part J: **Have Children living with you (under 19)?** If yes, please bring:

- Child care expense receipts including daycare, after school care and camps
- Receipts for Children's classes (sports, music, arts, computer, drama, etc **EXPIRES after 2016**)
- Did you receive the UCCB? Please bring RC-62 receipt from the government, **EXPIRES after 2016**
- If this is your first year using my service or just added a new member to your family, please bring their date of birth (MO/DD/YEAR)

Part K: Are you a **student or do you have children attending University or College?** If yes, please bring:

- T2202 receipt from school (don't bring tuition or books receipts)
- rent receipts (if paid rent for living away from home)
- interest paid on student loans

Part L: Did you have to pay for any **medical costs** (for which you did *not* get reimbursed from an insurance company) such as the deductible or don't have coverage. If yes, please bring:

- Prescription receipts
- Dental receipts
- Eye doctor receipts
- Medical supplies or equipment
- Payments made to a doctor
- Anything else you think is relevant

Part M: Are you or your children considered **disabled** for tax purposes? If yes, let us know and we can tell you what paperwork to bring.

Part N: Donations: Did you contribute to a **charity or political party?** If yes, please bring:

- donation tax receipts

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Part O: Is your **family income low** or in a lower tax bracket? If yes, please bring:

- property tax receipts OR
- rent receipts

Part P: Did you purchase your **first home** last year? If yes,

- tell me
- if you borrowed from your RRSP to purchase that house then please tell me how much you withdrew from it

Part Q: Did you **sell your home** last year? If yes, please bring:

- year of purchase
- selling price
- how you want to divide up the selling price between you and your spouse/common-law spouse (if applicable) in %

Part R: Do you own any **foreign** real estate, property, investments or bank accounts outside of Canada? Please let us know.

Part S: Anything else you might think is relevant.