



2010 PERSONAL INCOME TAX CHECKLIST

Name: _____

Telephone (res): _____ Telephone (bus): _____

Cell: _____ Fax : _____

E-Mail: _____

Address: _____

Marital status and children: *List names and dates of birth of all the members of your family, including yourself (only needed if any changes in 2010 or this is the first year with the tax preparer).*

Are you a Canadian citizen who approves passing your contact information to Elections Canada (check one): Yes No

Foreign reporting:

Do you have greater than \$100,000 Cdn of foreign property (such as stocks in foreign companies or real estate) (if yes please provide quick description) *(check one)* Yes No

Have you given or received assets to/from a foreign trust (such as receiving an inheritance from a foreign relative) (if yes please provide quick description) *(check one)* Yes No

Do you own shares in a foreign company which are not publicly traded on a major stock exchange (if yes please provide quick description) *(check one)*

Yes No

INCOME

- Employment - T4, T4A # of slips _____
 - Old age security - T4A(OAS)
 - Canada pension plan benefits - T4A(P)
 - Other pensions - T4A, T4RIF # of slips _____
 - Employment insurance - T4E
 - Interest, dividends and other investment Income - T5/T600 #of slips _____
 - Mutual funds and other trust income -T3 # of slips _____
 - Limited partnership - T5013 or copy of statements # of slips _____
 - Universal child care benefit - RC62
 - Business or Professional - Financial Statements # of businesses _____
 - Rental property (attach details of income, expenses, purchases and sales or see separate checklist) # of properties _____
 - Capital gains/losses
- Did you dispose of any capital properties this year? (e.g. mutual funds, shares, real estate) (Attach copies of sales detail and original purchase documentation or schedule of gains and losses. Please include T5008 or Annual Trading Summary)
- Alimony (provide copy of post-April 30, 1997 agreement or election, if changed or not previously provided)
 - Other income (e.g., stock options, annuities, scholarships, bursaries, research grants, RRSPs -attach T4RSP, Workers' Compensation benefits). # of slips _____

DEDUCTIONS

- Did you buy your first home for personal use last year? (*check one*)
 - Yes
 - No
- Registered retirement savings plan contributions (*attach receipts*) # of slips _____
- Annual union, professional dues (*attach receipts*) # of slips _____
- Child care expenses (attach receipts) # of slips _____
 - a) For individual providers, include S.I.N. and address _____
 - b) For summer camps, indicate number of weeks that were in-residence _____
- Public transit passes -monthly pass, weekly passes, (4 consecutive), electronic payment cards (minimum of 32 one-way trips (for self, spouse or dependent children under 19 years of age)
- Attendant care expenses (attach receipts)
- Allowable business investment losses (refer to capital gains/losses above)

Moving expenses (attach receipts). Indicate distance moved between old and new employment.

Alimony or separation allowances paid (include name(s) and address(es) of recipients; attach copy of agreement or court order for spousal support which was signed on or after May 2, 1997 or election, if changed or not previously provided)

Commissions and employment expenses (include details and T2200, TL2 or see separate checklist)

Carrying charges (interest on money borrowed to earn dividends and interest, investment fees, interest for limited partnerships, safety deposit box fee)

Other deductions and expenses (attach receipts)

Federal and provincial political contributions (attach receipts) # of slips _____

Charitable donations (attach receipts) # of slips _____

Medical expenses (attach receipts) and details of private health insurance premiums, including amounts paid while traveling # of slips _____

Disability deduction for you or dependant (if first time claim, attach T2201 signed by physician)

Tuition fees (attach T2202/T2202A including amounts that can be transferred from dependants) # of slips _____

Labour-sponsored funds - T5006 # of slips _____

Limited partnership investments # of slips _____

Interest paid on student loans (attach reporting slips)

For wholly dependent person, please attach list and indicate for each dependant: name, address if different, relationship, birth date, S.I.N., and net income. Note infirmity, if any

Adoption expenses

Receipts for Federal Child Fitness Tax Credit. # of slips _____

Receipts for Ontario Child Activity Tax Credit. # of slips _____

OTHER

- 2010 Instalments (attach all instalment receipts or notices).

Total remitted: \$ _____

- Attach copy of 2009 notice of assessment/reassessment

- Municipal property taxes (Ontario) or rent paid on residence. Check rent or property tax and provide the total amount.

Rent

Property tax

Total: \$ _____

- Attach details of RRSP - Home Buyers' Plan or Lifelong Learning Plan withdrawals and/or the Canada Revenue Agency's Statement of Account concerning these plans, if received.

- Amount of any distributions or loans from foreign trusts received in 2010

- Details of foreign property, other than personal use property, if aggregate cost is in excess of \$100,000.

- Attach copy of prior year personal tax return if using a new tax preparer.

NOTES
