

# Peter Harasymchuk Inc.

## Certified Management Accountant

### Personal Income Tax Return Checklist

Surname:	_____	Marital Status:	<table border="1"><tr><td>M</td><td>C/L</td><td>W</td><td>D</td><td>Sep</td><td>S</td></tr></table>	M	C/L	W	D	Sep	S
M	C/L	W	D	Sep	S				
First Name:	_____	Birthdate:	_____ SIN: _____						
Spouse :	_____	Birthdate:	_____ SIN: _____						
Children:	_____	Birthdate:	_____ SIN: _____						
Children:	_____	Birthdate:	_____ SIN: _____						
Children:	_____	Birthdate:	_____ SIN: _____						
Children:	_____	Birthdate:	_____ SIN: _____						
Address:	_____								
Phone:	Home: _____	Work: _____	Email: _____						
			Cell: _____						

#### Information slips:

Employment income - (T4)	( )
Pension - (T4A)	( )
CPP/Old Age Security - (T4A(P))/(OAS)	( )
Unemployment - (T4U)	( )
Interest/Dividends - (T5)	( )
RRSP, DPSP, RPP, RRIF	( )
Estates/Trusts/Mutual funds - (T3)	( )
Social Assistance/WCB - (T5007)	( )
Partnership/Tax Shelters (T5013)	( )
Other Slips _____	( )

#### Provide information on

Deductible employment expenses - (T2200)	( )
Alimony/maintenance paid or received	( )
Rental property income and expense	( )
Foreign income and expense	( )
Business/professional income and expense	( )
Self employed commission income /expense	( )
Farming or fishing income and expense	( )
Capital gains and losses	( )
Taxable benefits not on T4	( )
Other _____	( )
_____	( )

#### Foreign Property Reporting

Do you own foreign property worth more than \$100,000?	<input type="checkbox"/> yes	<input type="checkbox"/> no
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#### Other comment or information:

\_\_\_\_\_  
\_\_\_\_\_

#### Receipt for the following:

RRSP contributions	( )
Union/professional dues	( )
Accounting/legal fees	( )
Investment counsel fees	( )
Safety deposit box rental	( )
Tuition and education - (T2202)	( )
Interest paid on investment loans	( )
Medical/ attendant care	( )
Disability - Self or family member	( )
Charitable/political donations	( )
Student loans	( )
Childcare expenses/Recreation receipts	( )
Caregiver amounts	( )
Moving expenses	( )
Transit passes	( )
Other _____	( )

#### Documents for the following transactions:

Stocks/bonds/mutual fund sales	( )
Commodity transactions	( )
Tax shelters	( )
Real estate sales or purchases	( )

#### Other Items

Assessment notices received in the year	( )
RRSP Home Buyers Plan - T1036	( )
Citizenship Canadian	( )
Other _____	( )