

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 Porperty Reporting

Due you own foreign property worth more than \$100,000? yes no

Other comment or information:

Receipt for the following:

RRSP contibutions	()
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	()
Chariable/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 _____	()