

SJB Bookkeeping & Accounting Inc.

2012 Personal Tax Checklist

Instructions

This checklist is provided to our clients during tax season to assist them in collecting their tax data. Please feel free to give a copy of this checklist to family and friends to use for organizing their own tax information or simply have them call our firm for assistance.

1. Personal Information

Name:	
Address:	
City/Province:	
Postal Code:	
Telephone:	
Telephone(Business)	
Fax:	
Email:	
Birth date(M/D/Y):	
S.I.N:	
Marital Status:	

2. Spouse, including common-law

Name-first & last	Birth date (M/D/Y)	S.I.N.

3. Dependents

Name-first & last	Birth date(M/D/Y)	Male or female	S.I.N.

4. Information T-slips

These are the standard prescribed forms on which income is reported by the payer

Employment Income		Yours	Spouses	Dependant
Employment income	T4, T4A			
Directors fees	T4A			
Commission	T4A			
Previous Year Assessment				
Pension/retirement income				
Pension/annuity income	T4A			
Old Age Security	T4A(OAS)T4AP			
Canada Pension Plan	(P)T4RSP, T4RIF			
Income from RRSP or RRIF				
Investment Income				
Interest & dividends	T5			
Mutual funds and other trusts	T3			
Other sources				
Partnership income	T5013			
Unemployment insurance	T4E			
Purchase & sale of securities	T5008			
Tax shelters				
Workman' Compensation	T5017			
Other (specify)				

5. Official Receipts

Please provide your official receipts to support these deductions/credits:

Item		Attached
RRSP contributions		
Charitable donations		
Political donations		
Professional dues		
Tuition fees		
Education deduction (signed if being transferred)	T2202/T2202A	
Disability credit	T2201	
Medical		
Nursing		
Dental		
Prescriptions		
Fitness & activity		

Conditions of employment	T2200	
RRSP to home ownership details		
Interest on tuition loan		
Volunteer Emergency Firefighter		
Public Transit		
Caregiver		
Other-please specify		

6. Other Income & Deductions

Employment

	Attached	Coming	N/A
Details regarding cash & non-cash benefits of employment not reported on a T-slip			
Details regarding employer stock options granted or exercised in the year			
Automobile expenses			
Office/workspace in the home expenses			
Other employment-related expenses			

Business: self- employment or partnership

	Attached	Coming	N/A
Summary of income & expenses from self-employment			
Unincorporated business or partnership			
Details regarding HST collected and paid (if applicable)			

Investments

	Attached	Coming	N/A
Listing of income & expenses from rental properties, on a property-by-property basis(indicate ownership split)			
Particulars relating to tax shelter investments (including limited partnerships)			
Carrying charges & interest paid to earn income from investments, safety deposit box fees, accounting, investment counsel fees			
List of investments owned at the end of 2012 on which interest is required to be reported on an accrual basis (e.g. compound CSBs, long-term GICs, strip bonds, etc.)			
Details on the sale of investment assets (e.g. stocks, bonds, mutual funds, land & building)-provide the original cost, proceeds and selling/commission expenses			

Other deductions/tax credits

	Attached	Coming	N/A
Amount of alimony or child support paid or received in the year & the name & address of the payee			
Details regarding eligible moving expenses			

	Attached	Coming	N/A
Amount of non-reimbursed medical expenses (including premiums for private health insurance) paid during the year for yourself and your dependants			
Pharmacy printout of all prescriptions for the 2012 year			
Property taxes or rent paid in the 2012 year			

7. Other Information

	Attached	Coming	N/a
Pre-printed address labels from Revenue Canada			
Notices of (re) assessment received during the year for each taxpayer, including the RSP contribution limit statement			
Details regarding installment payments made during the year (attach a Revenue Canada statement or cancelled cheques)			

Tax, accounting and bookkeeping services for individuals and businesses.