

YEAR: _____

NAME _____ S.I.N. _____

ADDRESS _____

TEL (H) _____ TEL (B) _____

DATE OF BIRTH _____ MARITAL STATUS _____

PERSONAL INCOME TAX KIT

GENERAL ITEMS

- Notice of assessments
- Other year re-assessments (if any)
- T4 (employment); T4A (commissions/self employed)
T4U (employment insurance)
- T4OAS (old age security)
- T5 (investment income); T3 (income from trusts)
- T5007 (workers' compensation/social assistance)
- T5013 (partnership income)
- Capital gains and losses
- Foreign tax credit
- T4RSP (retirement savings plan income)
- RRSP contribution slips
- Medical receipts
- Charitable donations
- Tuition fees/education credits
- Interest paid on student loan(s)
- Professional dues/unions dues
- Details of foreign property holdings (if any)
- Carrying charges/loan interest

EXPENSES

- Safety deposit box fees
- Professional consultants' fees
- Child support income/payments
- Separation agreement (if it is the first year)
- Child care expenses
- Property taxes/rent paid and to whom
- Moving expenses
- Political donations

RENTAL PROPERTY

- Address and number of units
- Rent per unit
- Mortgage interest
- Property taxes paid
- Utilities
- Repairs and maintenance
- Renovations costs
- Other rental expenses

BUSINESS INCOME

- Revenue and expenses for the year
- Assets additions
- Loans and interest charges
- Business use of home
- Business use of auto

SELF-EMPLOYMENT

/COMMISSION & TRAVEL

- Form T2200 from employer
- Auto operating costs
- Advertising and promotion
- Business use of home



ACETI FALCONE LLP
CHARTERED PROFESSIONAL ACCOUNTANTS