Parks & Company
Chartered Professional Accountants

Personal Tax Checklist 20____

Client Name: ______________________ **Phone:** ______________ **Email:** ______________

Spouse/Dep: ______________________ **Phone:** ______________ **Email:** ______________

Address: ____

*New Clients need to provide a copy of the **Last Tax Return** filed with the CRA and **Notice of Assessment**

MOST COMMON INCOME ITEMS:

O All current year **Tax Slips** (T3's, T4's, T4a Pensions, T4a CPP & OAS, T4RRSP's, T4RIF's, T5's, T5008's etc.)
O **Investment Advisor package** with worksheets and expenses; Details of other **Capital Gains** / net capital losses
O **T2125 Self Employment Worksheet** completed (if applicable) with proprietary income, expense & GST details
O **T776 Rental Worksheet** completed (if applicable) with income, expenses and questions answered & initialed
O **Other items** not reported on Slips or Worksheets: ______________________

O Is there potentially missing slips or other income which needs to be reported on your tax return? Y / N

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DEDUCTIONS AND CREDITS:

O **RRSP receipts** for balance of current tax year being reported, plus 1st 60 days of the following year;
O Allowable **Medical receipts** (Out of pocket Doctor, Dentist, Optometrist, Naturopath, Prescriptions etc.)
O **Donation receipts** (if applicable) for charitable cash or stock gifts to registered Canadian charities;
O **T777 Employment Expense Worksheet** (if applicable) and T2200 completed with allowed expenses per T2200
O **Other items:** such as Tuition/Education receipts (T2202a), Child Care, Union Dues, Support Payments etc.

O Are there other deductions or credits you wish to claim or discuss? Y / N ______________

OTHER ITEMS:

Changes since last tax return filed: such as Address, Phone Number and/or Email (For returning & new clients)

Changes to Marital status, dependants, living arrangements, residency or any important **CRA Correspondence**

And any other potential information unique and specific to your personal tax situation

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