TOM WILHELM PROFESSIONAL CORPORATION

Chartered Professional Accountants

Personal Tax Return Checklist

The following information, where applicable, will be required in order to complete your personal tax return. Please review this list and check any items that apply to you. When you have received all the necessary documents, please assemble the documents and bring them to our office along with a copy of this checklist.

Name: ____________________ **E-mail:** ____________________ **Phone # :** ____________________

Preferred method of communication? **E-mail** ☐ **Phone** ☐ **Do you wish to use secure portal** **Yes** ☐ **No** ☐

Please answer the following questions:

1	Address and phone # same as last year?	**Yes** ☐	**No** ☐	(if no, please provide details, consider moving expenses)
2	Marital status same as last year?	**Yes** ☐	**No** ☐	(if no, please provide details and date of change)
3	Children born/adopted during the year?	**Yes** ☐	**No** ☐	(if yes, please provide details)
4	Are we preparing your spouse/childrens' returns?	**Yes** ☐	**No** ☐	(if yes, please provide details of their income)
5	Did you use direct deposit last year?	**Yes** ☐	**No** ☐	(if no and you would like to use it this year, provide "void" cheque
	- If yes, has your bank account changed?	**Yes** ☐	**No** ☐	(if yes, attach new void cheque)
6	Do you currently work with a financial planner?	**Yes** ☐	**No** ☐	(Please provide contact information)

Please check the following, if applicable:

Government forms:

☐ - T4 - for wages or salary

☐ - T4A - pension income, T4OAS - Old Age Security, and T4AP - Canada Pension Benefit

☐ - T4E - for employment insurance income

☐ - T4RSP - for RRSP income

☐ - T4RIF - for Retirement Income Fund income

☐ - T3 - for investment/trust income

☐ - T5 - for investment income

☐ - TL2 - for transport drivers (for meals & showers)

☐ - T2200 - for salesperson's expense and tradesperson's tools (include HST # of employer)

☐ - T5007 - for workers' compensation and social assistance payments

☐ - T5008 - if you own and have bought/sold securities

☐ - T5013 - for partnership income

Other receipts, expenses we require, and credits that may apply:

☐ - First time home buyers may be eligible for the Home Buyer's Tax Credit

☐ - Charitable donations in the year and any unclaimed donations from prior years

☐ - Receipts for contributions to Federal or Provincial political parties

☐ - Medical expense receipts for yourself and dependants;

- if you have numerous drug receipts, an annual summary from your pharmacy would be appreciated; include details of any out of town travel for medical reasons, statement of premiums for extended Medical coverage (please remove duplicate receipts and staples)

☐ - Child care expenses including name, address and S.I.N of caregivers (babysitter, daycare, camps), incurred.

☐ - List of moving expenses if new residence is > 40km closer

☐ - Receipts showing interest paid on money borrowed to earn investment income

☐ - Receipts showing interest paid on student loans

☐ - Property tax statements or rent receipts for rent paid in the year

☐ - Details of alimony/child support/maintenance paid or received during the year and any changes to court rulings

Government forms: (continued)

- ☐ - T5003, T5004, T5006 - for tax shelter information
- ☐ - T215 - Past Service Pension Adjustment
- ☐ - T2022A slips for tuition credits (yours or child's)
- ☐ - RRSP contribution slips

Other receipts, expenses we require, and credits that may apply:

- ☐ - Details of any other income or expense items
- ☐ - Details of trades in Bitcoin, other cryptocurrencies and other cash currency exchanges
- ☐ - T2201 - Disability Tax Credit Certificate acceptance letter from CRA.

Other information:

- ☐ - Details of expenses relating to any commission income earned
- ☐ - Details of rental income and expenses
- ☐ - Details of business income and expenses
- ☐ - Details of disposition of capital property (gain/loss report or statement of adjustments from lawyer) during the year (e.g. stocks, bonds, real estate, mutual funds)
- ☐ - Did you spend more than 183 days outside of Canada in the taxation year? (Provide details)
- ☐ - Did you withdraw funds from your RRSP under the Home Buyer's Plan or the Lifelong Learning Plan during the year or in the previous year?
  - if yes, please provide details. (i.e. Home Buyer's Plan Statement of Account)
- ☐ - Details of foreign investments (if aggregate cost is greater than CDN $100,000) and income, including from foreign trusts and foreign partnerships
- ☐ - Did you sell your principal residence (Please provide year of acquistion and proceeds of sale. Verify if you claimed principal residence gain exemption in prior years.)
- ☐ - Do you have living with you: a parent or grandparent, or an infirm child, or relative over the age of 18? You may be eligible for certain credits. Please provide us with details. (Call us to discuss)
- ☐ - Has there been a change in status that may qualify you to claim the disability tax credit? Please advise so a T2201 application can be drafted to give to your doctor to complete.

Taxpayer's legal representative:

- ☐ - If you have the power of attorney for an individual you MUST provide copy of the power of attorney.
- ☐ - If you are the executor of an estate you MUST provide legal documentation (copy of Will) from your lawyer as verification in order for the tax return to be processed.

- Please provide the name of the individual you are acting on behalf of:

First Name: ______________________

Last Name: ______________________

Title: ______________________