

SJB Bookkeeping & Accounting Inc.

2009 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 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 (Home): _____

Telephone (Business): _____

Fax: _____

Email: _____

Birth date (M/D/Y): _____

SIN: _____

2. Spouse, including common-law with no income

Name	Birth Date (M/D/Y)	SIN

3. Dependents with no income

Name	Birth Date (M/D/Y)	SIN

4. Information T-Slips

Attached

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

Employment income

Employment income	T4, T4A
Directors fees	T4A

Pension/retirement income

Pension/annuity income	T4A
Old Age Security	T4A (OAS) T4A
Canada Pension Plan benefits	(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	T4U
Purchase and sale of securities	T5008
Tax shelters	
Other (specify)	

5. Official Receipts

Attached

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

RRSP contributions	
Charitable donations	
Political donations	
Professional dues	
Tuition fees	
Education deduction	T2202/T2202A
Disability credit	T2201

6. Other Income and Deductions

	Attached	Coming	N/A
Employment			
Details regarding cash and 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			
Summary of income and expenses from self-employment, unincorporated business or partnership;	_____	_____	_____
Details regarding GST collected and paid (if applicable)	_____	_____	_____
Investments			
Listing of income and expenses from rental properties, on a property-by-property basis (indicate ownership split);	_____	_____	_____
Particulars relating to tax shelter investments (including limited partnerships);	_____	_____	_____
List of investments owned at the end of 2004 on which interest is required to be reported on an accrual basis (e.g. compound CSBs, long-term GICs, strip bonds, etc.);	_____	_____	_____
Carrying charges and interest paid to earn income from investments, safety deposit box fees, accounting fees, investment counsel fees;	_____	_____	_____
Details on the sale of investment assets (e.g. stocks, bonds, mutual funds, land & buildings) — provide the original cost, proceeds, and selling/commission expenses	_____	_____	_____

Attached Coming N/A

Other deductions/tax credits

The amount of alimony or child support paid or received in the year and the name and address of the payee, if applicable;

Details regarding eligible moving expenses;

Details regarding child care expenses for any child who was under 16 at any time in 1997 (include the SIN of any individual providing care; and include receipts or cancelled cheques for all lessons and extracurricular programs);

The amount of non-reimbursed medical expenses (including premiums for private health insurance) paid during the year for yourself and your dependents:

Property taxes or rent paid in the year

7. Other Information

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.
 Burlington, Canada**