

Canadian Tax Filing Checklist



FIRST YEAR OF FILING

Name (Mr./Ms.)		Cell			
E-mail ID		Home Address			
SIN	Date of Birth _(YY/MM/DD)				
Referred by					
Are you a Canadian Citizen <input type="radio"/> YES <input type="radio"/> NO		Date of landing in Canada <small>(1st Tax Return)</small> <small>(YY/MM/DD)</small>			
Do you own/hold foreign property with value more than \$100,000 CAD <input type="radio"/> YES <input type="radio"/> NO		Have you setup Direct Deposit for Tax Refund? If no, attach a void cheque to setup one. <input type="radio"/> YES <input type="radio"/> NO			
Did you sell your home in this tax year <input type="radio"/> YES <input type="radio"/> NO					
Residency Status <input type="radio"/> Resident <input type="radio"/> Non-Resident					
Do you qualify for Disability Tax Credit <input type="radio"/> YES <input type="radio"/> NO					
Marital Status <input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Common-law <input type="radio"/> Separated <input type="radio"/> Divorced <input type="radio"/> Widowed					
Any change in Marital Status <input type="radio"/> YES <input type="radio"/> NO		Child Care Expenses			
Spouse / Children Name	Date of Birth	SIN	Disability (Yes/No)	Relationship (Husband/Wife/Son/Daughter)	

INCOME

- Business Income
- Capital Gain on Sale of Property
- Foreign Income
- Income Slips (T4/TA/T4E/Other)
- Investment Income
- Partnership Income T5013
- Rental Income
- RRSP Withdrawal
- Spouse Support Payment Received

COMMON TAX WRITEOFFS

- Business Expenses
- Child Care Receipts
- Disability Tax Credit claim Form T2201
- Donation/Political Contribution Receipts
- Employment Expenses (T2200)
- Medical, Dental, Prescription Drugs Expenses
- RRSP Contributions
- Professional & Union Dues
- Property Tax/Rent Receipts / Mortgage Statement
- Student Loan Interest Tuitions Fees T2202A