

Canadian Tax Filing Checklist



FIRST YEAR OF FILING

Name (Mr./Ms.)				
Cell		E-mail ID		
Home Address		Date of Birth _(YY/MM/DD)		
Referred by				
SIN		Has your SIN changed? <input type="radio"/> YES <input type="radio"/> NO		
Are you a Canadian Citizen <input type="radio"/> YES <input type="radio"/> NO		Date of landing in Canada _(YY/MM/DD)		
Residency Status <input type="radio"/> Resident <input type="radio"/> Non-Resident				
Have you setup Direct Deposit for Tax Refund? If no, attach a void cheque to setup one				
How much Property Tax or Rent was paid from January to December?				
Do you own/hold foreign property with value more than \$100,000 CAD				<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
Do you have CRA My Account Login?				<input type="radio"/> YES <input type="radio"/> NO
Do you qualify for Disability Tax Credit				<input type="radio"/> YES <input type="radio"/> NO
Are you sponsoring your parents or grandparents on Super Visa?				<input type="radio"/> YES <input type="radio"/> NO
Are you sponsoring your parents or grandparents for PR in Canada?				<input type="radio"/> YES <input type="radio"/> NO
Are you planning to arrange a mortgage?				<input type="radio"/> YES <input type="radio"/> NO
Were you working as employee last year?				<input type="radio"/> YES <input type="radio"/> NO
Were you running your own business or company last year?				<input type="radio"/> YES <input type="radio"/> NO
Are you planning to start your new business?				<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

Notes