



	<u>Tax Payer</u>		<u>Spouse</u>	
Universal Child Care Benefits (UCCB) – Is RC62 slip attached?	Yes	No	Yes	No
If you are a single parent, is the UUCB designated to dependants?	Yes	No	Yes	No

## 6. General Income/Deductions

T4 Slips – Employment Income?	Yes	No	Yes	No
T4A - Commission and self-employment?	Yes	No	Yes	No
T4E – Employment insurance?	Yes	No	Yes	No
T5007 – Social assistance?	Yes	No	Yes	No
Employment income or taxable benefit not shown on T4 Slip?	_____			
	_____			
Amount paid for union and professional dues and organization names?	_____			
	_____			
List of Child care expense, with receipts, for each child?	Yes	No	Yes	No
List of moving expenses paid in the year?	Yes	No	Yes	No
List of support payments made or received?	Yes	No	Yes	No
List of deductible employment expenses?	Yes	No	Yes	No
Is a signed form T2200 attached?	Yes	No	Yes	No

## 7. Pension Income

T4A – Pension retirement and annuity income?	Yes	No	Yes	No
T4AP – Canada Pension plan benefits?	Yes	No	Yes	No
T4A(OAS) Old age security pension slip/foreign pensions?	Yes	No	Yes	No
T4A(RCA) – Retirement compensation arrangements?	Yes	No	Yes	No
T4RSP – Registered retirement savings plan income?	Yes	No	Yes	No
T4RIF – Registered Retirement income fund income?	Yes	No	Yes	No
Do you elect to split eligible pension income with your spouse or common-law partner?	Yes	No	Yes	No

**Taxpayer**

**Spouse**

**8. Investment Income/Deductions**

T3 – Income from trust allocations?	Yes	No	Yes	No
T5 – Investment Income?	Yes	No	Yes	No
T4PS – Income from Profit Sharing plans?	Yes	No	Yes	No
T5013/T5013(A) – Partnership income?	Yes	No	Yes	No
T5008 – Income from Securities transactions?	Yes	No	Yes	No

Did you dispose of property during the year? If so, provide the following details in a separate list:

Description of Property	Date Acquired	Date Disposed of	Sales Proceeds	Cost	Expenses for Disposal
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Interest paid to earn Investment Income: \_\_\_\_\_

Accounting/ Legal fees: \_\_\_\_\_

**9. Self-Employment/Business Income**

Financial statement(s)/ schedule of revenue and expenses attached?	Yes	No	Yes	No
Did you register to be eligible for Employment Insurance special benefits?	Yes	No	Yes	No
If an owner/manager, did you have a shareholder loan outstanding during the year?	Yes	No	Yes	No
If yes, provide details of borrowing and repayments: _____				
Did you use a vehicle for business, are the vehicle expenses and both Total and business mileage attached?	Yes	No	Yes	No
Did you use a portion of your home for business, are the home expenses and both total and business square footage attached?	Yes	No	Yes	No
Is a list of all new asset additions attached?	Yes	No	Yes	No

**10. Rental Income**

Did you own a rental property; is a statement of rental income and expenses attached?	Yes	No	Yes	No
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	<u>Taxpayer</u>		<u>Spouse</u>	
<b>11. RRSP Contributions</b>				
T-Slip for contributions made attached?	Yes	No	Yes	No
<b>12. Other Credit</b>				
T2202 – Tuition/education amount for you?	Yes	No	Yes	No
T2202 – Tuition/education amount claimed on transfer from dependant?	Yes	No	Yes	No
Receipt or amount for your student loan interest?	Yes	No	Yes	No
Receipts/Listing of all Medical expenses paid in the year for you, your spouse, and dependants?	Yes	No	Yes	No
Receipts for charitable donations or donations made by way of gifting an item in kind?	Yes	No	Yes	No
Were any loans associated with charitable donations?	Yes	No	Yes	No
Receipts for political contributions?	Yes	No	Yes	No
Tickets for public transit?	Yes	No	Yes	No
Receipts/Listing for fitness and extracurricular activity amounts paid for each child?	Yes	No	Yes	No
Statement for new home to claim the home buyer’s amount?	Yes	No	Yes	No
Amount of property taxes/rent paid in the year?	Yes	No	Yes	No
<b>13. Prior Year Tax Return Information/Correspondence</b>				
Is a copy of the Notice of Assessment for last year’s tax return attached?	Yes	No	Yes	No
If new to the firm, are tax returns (and corresponding Notice of Assessments) for the last three years attached?	Yes	No	Yes	No
If you claimed a loss carryback in any of the preceding 3 years, are the Notice of Reassessments for those years attached?	Yes	No	Yes	No
Is a copy of any other correspondence from Canada Revenue Agency attached?	Yes	No	Yes	No
If you would like your tax refund deposited directly into your account, is a void cheque attached?	Yes	No	Yes	No
Is your statement of installments paid for the year attached?	Yes	No	Yes	No

Taxpayer

Spouse

**14. Filing Method/ Tax Return Delivery**

Please note that Canada Revenue Agency mandate that tax returns must be filed electronically.

How do you want your tax returned delivered once completed?

- Hold for pick up at Wilson Chartered Accountants
- Mail to my home address via Canada Post. There is a handling/postage charge of \$ 5.00+.  
(Please note larger packages will need to be mailed/shipped by Express Post or Courier, the postage charge will start at \$15.00 plus)
- Courier to my home address. There is a handling/courier charge of \$ 20.00 for this service
- Other. Please explain: \_\_\_\_\_