

MacPherson Adams - Chartered Accountants
Personal Income Tax Return - 2014 Checklist

Name: _____ Phone: _____ Home: _____
 Date of Birth: _____ Office: _____
 Address: _____ Cell: _____
 _____ Email: _____

Dependent children's S.I.N. D.O.B. Marital Status: _____
 full names: *Indicate date, if changed
 _____ Spouse's full name: _____
 _____ Date of Birth: _____

At any time in 2014, did you own any foreign assets for which you paid more than \$100,000CDN? Y N
 Do you want the CRA to provide your name, address & date of birth to Elections Canada? Y N
 Are you a US citizen? Y N Are you a Green Card Holder? Y N
 Were you born in the US? Y N Were your parents born in the US? Y N
 Business/Employment/Commission Expenses: I've already summarized Please summarize at extra cost

1 Please include a copy of your 2013 Notice of Assessment from Canada Revenue Agency, as well as any Notices of Reassessment and any other correspondence from the CRA.

2 If, in the course of preparing your tax return, it is found that electing to split pension income results in an overall tax reduction for you and your spouse, would you like us to prepare the necessary forms? Y N

3 Please be cautioned that this list includes only those items most commonly found on income tax returns. The list should not be considered exhaustive or complete. If you have items not included below and feel they may pertain to your personal income tax return, please inform the office.

Sources of Income (provide slips, documents or details)

- | | | |
|---|--|--|
| <input type="checkbox"/> Employment income (T4) | <input type="checkbox"/> Old Age Security (T4A OAS) | <input type="checkbox"/> Universal child care benefit (RC62) |
| <input type="checkbox"/> Investment income (T5/T3) | <input type="checkbox"/> Canada Pension Benefits (T4A(P)) | <input type="checkbox"/> Spousal/child support received |
| <input type="checkbox"/> - Dividends (T5) | <input type="checkbox"/> Pensions & other income (T4A) | <input type="checkbox"/> RIF Income (T4RIF) |
| <input type="checkbox"/> - Interest (T5/T3) | <input type="checkbox"/> RRSP income (T4RSP) | <input type="checkbox"/> Business income/expenses* |
| <input type="checkbox"/> - Trust income (T3) | <input type="checkbox"/> Capital gains/losses (please provide investment broker transaction summary) | <input type="checkbox"/> Rental income/expenses* |
| <input type="checkbox"/> - Partnership returns (T5008/5013) | | <input type="checkbox"/> Fishing income/expenses* |
- *please contact office for more info

Deductions & Credits (provide receipts, documents or details)

- | | | |
|--|--|---|
| <input type="checkbox"/> RRSP contributions | <input type="checkbox"/> Investment counsel fees | <input type="checkbox"/> First-time home buyer tax credit |
| <input type="checkbox"/> Home Buyers Plan repayment | <input type="checkbox"/> Children's fitness / art expenses | <input type="checkbox"/> Spousal/child support payments |
| <input type="checkbox"/> Child care expenses | <input type="checkbox"/> Tools for tradespersons | <input type="checkbox"/> Student loan interest paid |
| <input type="checkbox"/> Medical/dental/attendant expenses | <input type="checkbox"/> Deductible employment expenses | <input type="checkbox"/> Installments paid |
| <input type="checkbox"/> Professional/Union dues | - office in home | <input type="checkbox"/> Moving expenses |
| <input type="checkbox"/> Tuition fees (T2202 completed & signed if transferred from dependant) | - auto expenses | <input type="checkbox"/> Charitable donations |
| | <input type="checkbox"/> Monthly transit passes | <input type="checkbox"/> Political donations |