

## PERSONAL INCOME TAX RETURN CHECKLIST 2011

1. **Your Name(s):** We ask you to prepare personal income tax returns for the following persons:

\_\_\_\_\_  
\_\_\_\_\_

2. I/We want our return(s) to be:  Picked up by us  Mailed to us (if done by April 15<sup>th</sup>) or  
 Couriered to us (courier charges will be applied to your account)

3. Efile Yes  No  If yes, where do we send T183 for efile approval?  
Fax#: \_\_\_\_\_ & Phone #: \_\_\_\_\_ or Email: \_\_\_\_\_

4. **Marital status** (if changed in the year, provide details and date \_\_\_\_\_)

5. List of dependants including names and birthdates (please attach list).

### Information slips for the following income:

- T4 Employment
- T4A Pension, retirement, annuity, other
- T4A(P) CPP
- T4A(OAS) Old Age Security
- T4E Unemployment Insurance
- T5/T600 Dividends, interest and annuities
- T3 Mutual income fund & trust
- T101 Tax Shelters
- T4RSP Withdrawals from RRSP
- T4RIF Withdrawals from RRIF
- T5013 Limited Partnerships
- T5008 Statement of securities transactions

### Receipts for the following:

- RRSP contributions
- Moving expenses – *see form TIM on website*
- Accounting/legal fees
- Tuition fees/education deduction (T2202A)
- Foreign Tuition form - *see TL11A on website\**
- Investment counsel fees
- Safety deposit box rental
- Interest paid on investments
- Interest paid on student loans
- Caregiver amount
- BC Venture Capital tax credit
- Child care expenses
- Charitable & political donations
- Medical/attendant care expenses - *see website\**

### Documents for the following transactions:

- Real estate sales or purchases
- Stocks/bonds/mutual funds sales
- Stocks/bonds/mutual funds purchases
- Commodities, purchases and sales
- Tax shelters, purchases and sales
- New automobile lease (if you claim car expenses on your tax return)

### Provide details of:

- Deductible employment expenses – *see form T777 on website*
- Alimony/maintenance paid/received (ex-spouse SIN)
- Union/professional dues
- Foreign income, expenses and tax paid
- Business/professional income – *see form T2125 on website\**
- Labour-sponsored funds – T5006
- Capital gains/losses (*see website\**)
- Rental income and expenses – *see form T776 on website\**
- RRSP Home Buyer's Plan - withdrawals and repayments
- RRSP Lifelong Learning Plan – withdrawals and repayments
- Disability credit (if new for 2011)
- Equivalent to spouse (name of child) \_\_\_\_\_

### Other items:

- 2010 Notice of Assessment (**IMPORTANT TO SEND US**)
- Tax instalments paid
- Notice of Reassessment for a prior year's tax return
- Foreign property with cost in excess of \$100,000
- Transactions with non-resident trusts (see website for details)

6. **Don't forget**

- The Engagement and Representation letter(s) have been signed and enclosed.
- All required info on the checklist is enclosed. If not, I/We have listed the nature of the outstanding info including amounts:

\_\_\_\_\_  
\_\_\_\_\_

7. Review this checklist to ensure you send us ALL info needed to prepare your personal tax return(s).