

# T1 Personal Tax Return Checklist

To assist with the preparation of your personal income tax return, you may wish to complete the following checklist and return it to us with your tax documents:



Personal Information (If Changed)	Spouse Information (If Applicable)
Name: _____	Name of Spouse: _____
Address: _____	Home Phone #: _____
City: _____	Cell Phone #: _____
Province/State: _____ Postal Code: _____	E-mail: _____

**Please confirm your contact information:**

E-mail: \_\_\_\_\_ Cell Phone #: \_\_\_\_\_  
 Home Phone #: \_\_\_\_\_ Work Phone #: \_\_\_\_\_

**How would you like your tax return delivered once it has been completed by us?**

Electronic copy via secured email and electronic signing      Printed and will sign in person

Electronic copy via secured email and will sign in person      Mailed

Other (please specify): \_\_\_\_\_

<b>Marital Status:</b>	Single	Married	Common-Law	Separated	Divorced	Widowed	Link: CRA Marital Status
Did your marital status change from last year's tax return?				Yes	Date status changed: _____/_____/_____ MM DD YY	No	

If we are NOT preparing a tax return for your spouse, please provide: *Net income amount from Line 23600* \$ \_\_\_\_\_

**New dependants during the year:**

Name	Relationship	Birthday (MM/DD/YY)	SIN #	Net Income
_____	_____	_____/_____/_____ _____/_____/_____ MM DD YY	_____	\$ _____
_____	_____	_____/_____/_____ _____/_____/_____ MM DD YY	_____	\$ _____

As a Canadian citizen, do you authorize the CRA to give your name, address and DOB to Elections Canada?

Yes      No

Do you authorize the CRA to share your name, email address and postal code to BC Transplant for contact purposes?

Yes      No

Do you, your spouse or your dependents qualify for the Disability Tax Credit?

Yes      No

Do you own/hold foreign property with a total cost of more than \$100,000 (CAD)?

Yes      No

Are you the beneficiary of a foreign trust?

Yes      No

Did you sell any real property/land?

Yes      No

Did you sell any investments?

Yes      No

Did you repay, or did the CRA recover, any Covid related benefits?

Yes      No

Do you pay rent? (BC renter's tax credit)

Yes      No

Do you subscribe to a digital news subscription? (i.e. Times Colonist)

Yes      No

Did you purchase a home for the first time, or purchase a home after not owning a home in any of the 4 preceding years?

Yes      No

## Rental Property

Please include the Statement of Adjustments/Purchase documents if acquired in the year

Did you sell real estate in the year? If yes, please provide details.

Date Rental Started (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Total Rental Income \$ \_\_\_\_\_

### Eligible Expenses

Advertising

Insurance

Mortgage statement showing interest paid

Office expenses

Legal

Management & administration fees

Repairs and maintenance

Salaries, wages & benefits

Property taxes

Travel

Utilities

Other

Major renovations & purchases (i.e. appliances) \_\_\_\_\_

## Eligible Employment Expenses

Please provide us with a signed T2200 - Declaration of Conditions of Employment from your employer.

Travel

Name of Business: \_\_\_\_\_

Parking

Type of Business: \_\_\_\_\_

Supplies (stationary, other)

Name of Partner: \_\_\_\_\_ % owned: \_\_\_\_ %

Telephone

SIN # of Partner: \_\_\_\_\_

Salaries paid to an assistant

Business Number: \_\_\_\_\_ (if applicable)

Office rent

Are we preparing your GST/HST Return? Yes No

Vehicle expenses

Do the following amounts include GST/HST? Yes No

Home office expenses

**Revenue**

The following expenses apply to commission employees only:

**Expenses:**

Accounting & legal

GST/HST on sales collected

Advertising & promotion

Meals & entertainment

Meals & entertainment

Insurance

Rental of office equipment

Interest & bank charges

Training

Licenses, dues, memberships & subscriptions

## Vehicle Expenses

Year, make & model: \_\_\_\_\_

Office expenses

Purchase/sale price: \$ \_\_\_\_\_

Supplies

Date of purchase (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Legal, accounting & other professional fees

OR Date lease began (MM/DD/YY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Rental

Kilometres (km) driven for business purposes in the year: \_\_\_\_\_

Salaries

Total kilometres (km) driven in the year: \_\_\_\_\_

Travel

### Expenses:

Telephone

Fuel

Vehicle expenses

Repairs & maintenance

Other: \_\_\_\_\_

Insurance

**Home Office (For Self-Employed & Employment Expenses)**

Licensing & registration fees

Total % of home used for business/employment: \_\_\_\_ %

Loan interest

Total square feet of home: \_\_\_\_ sqft

Lease payments

Heat

Car washes

Hydro

Parking (for business purposes only)

Water

Other

Repairs & maintenance

Insurance

Property taxes

Rent

Mortgage interest (self-employed only)