



Personal Income Tax Checklist

Year _____

Name: _____

Spouses Name _____

SIN: _____

SIN: _____

Birth Date: _____

Birth Date: _____

Address: _____

City: _____

Prov: _____

Postal: _____

Phone: _____

Email: _____

Country: _____

Children's Information

Name _____

Birth Date: _____

Name _____

Birth Date: _____

Name _____

Birth Date: _____

INCOME

Yes/No

- Employment Income (T4)
- Old Age Security (T4OAS)
- CPP / QPP (T4P)
- Other Pension Income (T4A)
- Foreign Pension Income
- EI Benefits (T4U)
- Interest or Dividend Income (T5)
- Canada Savings Bonds (T600, T5)
- Trust Income (T3)
- Foreign Source Income
- Income from Limited Partnerships
- RRSP Income (T4RSP)
- RRIF Income (T4RIF)
- Retiring Allowance (T4A)
- Self-Employment Income / Expenses *
- Rental Income / Expenses

DEDUCTIONS

Yes/No

- RRSP Contributions
- Union or Professional Fees
- Tuition Fees / Dependant Tuition
- Medical Expenses
- Charitable Donations
- Safety Deposit Box Rental
- Accounting / Investment Fees
- Political Contributions
- Installment Tax Payments
- Moving Expenses
- Investment Loan Costs
- Rent / Property Tax
- Employment / Auto Expenses **
- Home Office Expenses ***
- Child Care Expenses ****
- Other -

If yes, place a check in the box

Please include your prior year Notice of Assessment (or prior year Income Tax Return)

***Self Employment Income** - Detailed accounts of revenues, expenses and GST remittances

****Employment / Auto Expenses** - A T2200 should be completed by your employer. Allowable auto expenses include fuel, maintenance, insurance, loan interest, lease payments, licenses, parking, car washes. A detailed account of kms. driven and business portion is also required.

*****Home Office Expenses** - If you are required by your employer to have a home office OR you are self-employed. Allowable Home Office Expenses include: Property Tax, Repairs/Maintenance, Insurance, Utilities, Mortgage Interest, Telephone/Internet.

******Child Care Expenses** - The lower income earned is entitled to claim childcare expenses when the expense is incurred to earn employment income. To claim childcare expenses, you require the Name and Social Insurance Number of the individual OR the Name and Business Number of the person(s) being paid.

Notes:

Would you like your return E-filed? Yes No

Your _____ Tax Return has been professionally completed by:

**Interior Tax & File Small Business Services Inc.
113 1835 Gordon Drive, Kelowna BC V1Y 3H4**