

PERSONAL INCOME TAX RETURN CHECKLIST

PERSONAL INFORMATION

Your name	<input type="text"/>	<input type="text"/>	SIN #	<input type="text"/>	Date of birth	<input type="text"/>	
Your spouse	<input type="text"/>	<input type="text"/>	SIN #	<input type="text"/>	Date of birth	<input type="text"/>	
	<small>First</small>	<small>Last</small>				<small>DD MM YY</small>	
Address	<input type="text"/>			Did you immigrate in or moved out in the year?	Yes	No	
	<input type="text"/>	<input type="text"/>		If yes; Please provide:			
Home Tel:	<input type="text"/>			Date of landing	<input type="text"/>	Departure date <input type="text"/>	
Work / Mobile:	<input type="text"/>			Email:	<input type="text"/>		
Marital Status	Married	Widowed	Divorced	Common-law	Separated	Single	
Did your marital status change during the year?	Yes	No	If yes; please provide date		<input type="text"/>		
					<small>DD</small>	<small>MM</small>	
Did you sell any real estate property (including a rental property, or assignment sale) in last calendar year?	Yes	No					
(If yes, please complete our Real Estate checklist saved separately)							
Did you receive or pay spousal support payments under agreement?	No	Yes	If yes, please state		<input type="text"/>		
(we may ask for more details)							
Are we preparing tax return for your spouse?	Yes	No					
If we are not preparing a tax return for both, please provide the spouse's Net income from Line 23600 of T1 General						<input type="text"/>	
Dependants: List any dependants who were 18 years of age or under as of December 31st of the taxation year:							
	Name		Relationship	Net income \$	Birth Date		SIN #
1)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
2)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
3)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
4)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
	<small>First</small>	<small>Last</small>			<small>DD</small>	<small>MM</small>	<small>YY</small>
Do you, your spouse or any dependent qualify for the disability tax credit (with approved T2201)?	Yes	No					
I confirm I am providing my Government issued Photo ID				Do you have CRA 'My Account'?	Yes	No	
Would you like A&R LLP to access your CRA 'My Account'?	Yes	No	If yes; grant access Level 2 to A&R LLP RepID				
Access to your 'My Account' helps us access your tax slips, assist with CRA correspondence, use 'Auto-Fill My Return (AFR)' and more.							

Delivery of return and other important questions

(Unless otherwise indicated, we will assume the default response shown)

			Default
Do you want your return to be filed Electronically?	Yes	No	Yes
Do any of your family members qualify for the disability tax credit?	Yes	No	No
What is your residency type for EFILE?			
1. Canadian resident	Yes	No	Yes
2. Factual resident	Yes	No	No
3. Non-resident or Deemed resident (other than residency status 6 or 7)	Yes	No	No
4. Immigrant - entered Canada within the tax year	Yes	No	No
5. Emigrant - left Canada within the tax year	Yes	No	No
6. Deemed resident reporting only income from a business with a permanent establishment in a province or territory of Canada	Yes	No	No
7. Deemed resident reporting income from a business with a permanent establishment outside Canada and/or rental income from a property located outside Canada	Yes	No	No
Are you a Canadian citizen?	Yes	No	Yes
Did you sell a property in 2024 you are claiming a principal residence exemption?	Yes	No	No
Did you change the use of Principal Residence? (Reporting is required)	Yes	No	No
<i>Change in use Principal residence to Rental Property and Vice Versa, a separate election is required in this case.</i>			
Do you authorize CRA to provide information about you to Election Canada?	Yes	No	Yes
Who is applying for GST/HST credit? (entitlement is determined based on family income)	You	Spo	You
Did you or your spouse file a bankruptcy in last 5 years?	Yes	No	No
Do you or your spouse have any arrears or unpaid taxes to CRA?	Yes	No	No
How would you like to pay accountant's fee? (Not set up for Debit or Credit Card)	Cheque	Cash	e-transfer

SOURCES OF INCOME

Check the type of income box and provide us slips:

Source	Slip to bring
Employment income	T4
Pension, annuity, other income	T4A
Employment Insurance benefits	T4E
Profit sharing income Commission income	T4PS T4 or T4A
Old Age Security	T4(OAS)
Canada Pension Plan	T4AP
RRSP Income (withdrawal from RRSP)	T4RSP
RRIF Income	T4RIF
Scholarships and bursaries	T4A
First Home Savings Account	T4FHSA
Interest, dividends, mutual funds	T3, T5, T5008
Workers Safety Insurance	T5007
Social Assistance payments	T5007
Advance Canada Workers Benefit	RC210
Share from Limited Partnership	T5013
Foreign income (Attach slip or details)	
<input type="text"/>	<input type="text"/>
Type of foreign tax	Country
	Converted to C\$
Foreign tax paid (if tax treaty exists)	<input type="text"/>
Tips and gratuities	<input type="text"/>
Rental Income	If yes fill Real Estate checklist
Sales of Real Estate	If yes fill Real Estate checklist
Self-employed income	If yes fill self-employed checklist
Sales of Securities	If yes fill capital gain/loss checklist
Alimony received under agreement	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

If you have other income and/or deductions: that are not listed above please specify in the other line provided.

DEDUCTIONS AND TAX CREDITS AVAILABLE

Check the type of deductions/credits applicable and provide us slips:

Source	Amount
RRSP contributions	<input type="text"/>
FHSA contributions	<input type="text"/>
Investment loan interest	<input type="text"/>
Investment counselling fee	<input type="text"/>
Homebuyers Plan withdrawals/Pymts	<input type="text"/>
Life Learning Plan withdrawals/Pymts	<input type="text"/>
Moving expenses. (Min.40km closer to work)	<input type="text"/>
Union dues and profession fees	<input type="text"/>
Childcare expenses	<input type="text"/>
Charitable donations	<input type="text"/>
Political party contributions - Federal	<input type="text"/>
Political party contributions - Ontario	<input type="text"/>
Labor sponsored funds contributions	<input type="text"/>
Tuition & Exams for professional certification	<input type="text"/>
Tuition transfer from Spouse/Children	<input type="text"/>
Interest paid on student loans	<input type="text"/>
Multi-generational home renovation tax credit	<input type="text"/>
Other	<input type="text"/>
Air quality improvement tax credit	<input type="text"/>
(ONLY for self-employed and members of partnership)	
Rent paid	<input type="text"/>
Property taxes (self-occupied residence)	<input type="text"/>
Home Accessibility Expenses	<input type="text"/>
(for Senior / Disabled)	
Tool expenses	<input type="text"/>
(for trade persons & apprentice mechanics)	
Teacher's school supplies	<input type="text"/>
Tax installments paid to government	<input type="text"/>
Volunteer Firefighter/Search&Rescue Amount	<input type="text"/>
Labor mobility deduction	<input type="text"/>
(for tradespeople in construction industry)	
Employment expenses (Fill relevant checklist saved separately)	<input type="text"/>
Alimony payments made	<input type="text"/>
Medical / Dental expenses	<input type="text"/>
<input type="text"/>	<input type="text"/>