

2005 PERSONAL TAX CHECKLIST

1. PERSONAL INFORMATION

Did you move house during the year? *[yes/no]*: _____

If a Canadian citizen, do you authorize CRA to provide your name, address and date of birth to Elections Canada for the purpose of updating the National Register of Electors? *[yes/no]*: _____

Name _____
[First name, middle initial, last name]

Address _____

City/Prov _____ Postal Code _____

Telephone (home) _____ Telephone (work) _____

Fax (home) _____ Fax (work) _____

E-mail (home) _____ E-mail (work) _____

SIN _____ Birth date *[dd/mm/yy]* _____

Marital Status _____ Occupation _____

If you do not want your return e-filed, please check this box _____

2. SPOUSE (including common-law)

If marital status changed during the year, enter date of change: _____

<u>Name</u>	<u>Birth date</u> <i>[dd/mm/yy]</i>	<u>SIN</u>	<u>Net Income (line 236)*</u>
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3. DEPENDANTS (children, parents and others dependant on you for financial support)

<u>Name</u>	<u>Relationship</u>	<u>Birth date</u> <i>[dd/mm/yy]</i>	<u>SIN</u>	<u>Net Income</u> <i>(line 236)*</i>	<u>Live with</u> <i>you **</i>
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For any dependant who is infirm, please identify dependant and describe nature of infirmity: _____

* Provide details of income and deductions only if we are not preparing the tax return.

** Indicate whether dependant lived with you during the year *[yes/no]*

4. INCOME TAX REFUND AND GST CREDIT

Complete banking information to have your income tax refund and GST/HST credit payments deposited into your bank account.

Branch Number (5-digits) Institution Number (3-digits) Account Number (maximum 12-digits)

5. T-SLIPS (INCOME)

Attached

These are the standard prescribed forms on which Canadian income is reported:

Employment income

Employment/commission income	T4, T4A	_____
Director's fees	T4, T4A	_____
Employee profit sharing	T4PS	_____

Pension/retirement income

Pension/annuity income	T4A, T4A(OAS), T4A(P)	_____
Income from RRSP or RRIF	T4RSP, T4RIF	_____

Investment income

Interest & dividends	T5	_____
Mutual funds and other trusts	T3	_____

Other sources

Income from RESP	T4A	_____
Partnership income	T5013	_____
Employment insurance benefit	T4E	_____
Purchase and sale of securities	T5008	_____
Tax shelters	T101, T5013	_____

6. OTHER INCOME

Details of all other income including pensions received, directors fees, scholarships, etc. _____

7. INVESTMENTS (Income / Expenses)

Interest and other carrying charges paid to earn income from investments (including safety deposit box, accounting, and investment counsel fees). _____

Gains or losses from selling securities or other capital property—e.g. stocks, bonds, mutual funds, real estate (including broker's trading summaries or a transactions list showing *date of each purchase and sale*, currency, original cost and transaction fees). _____

Detailed listing of income and expenses from **rental properties** (download worksheet, if necessary) _____

Details regarding your interest in property held outside Canada (i.e. **foreign property**) —including bank accounts, investments, U.S. securities, trusts and real estate. (*Please consult me if you are unfamiliar with the reporting requirements*) _____

ALSO INCLUDE:

- Pre-printed address labels from Canada Revenue Agency if available.
- 2004 Notice of Assessment/ Reassessment.

Queen Accounting and Tax Corp.

166 Glenroy Cres., London, Ontario CANADA N5Z 4H7

Tel: (519) 649-4646 • Fax: (519) 668-6401 • Email: mail@queentax.com • Web: www.queentax.com

• Copy of 2004 personal tax return (if you are a first year client).

8. DEDUCTIONS/TAX CREDITS

Please provide the receipts/forms received for these deductions/credits:

For self only:

- RRSP contributions _____
- Home Buyers Plan withdrawals or repayments _____
- Lifelong Learning Plan withdrawals or repayments _____
- Charitable donations (provide details for in-kind donations, such as shares of stock) _____
- Political donations _____
- Professional/union dues _____
- Attendant care (if you claim the disability tax credit) _____
- Interest paid on student loans _____
- Property taxes or rent paid (see Note 7) _____
- Legal fees (see Note 1) _____
- Moving expenses (see Note 2) _____
- Alimony, maintenance or child support paid or received (see Note 3) _____
- Income tax installments (see Note 4) _____

For self and dependants:

- Disability tax credit T2201 _____
- Medical expenses (see Note 5) _____
- Tuition fees and Education deduction (see Note 6) T2202/2202A _____
- Childcare expenses (see Note 8) _____

- Note 1** If you incurred **legal expenses** in connection with employment termination, or claiming spousal or child support, please provide details.
- Note 2** If you moved at least 40 kilometers closer to a new place of work or school, please contact me to request form T1-M.
- Note 3** The amount of **alimony, maintenance or child support** paid or received in the year and the name, SIN, and address of the recipient, if applicable.
- Note 4** Details regarding **income tax installment** payments made during the year (include recent CRA Statement of Account or cancelled cheques).
- Note 5** Include receipts for all medical and health related expenses including nursing, nursing home, prescription eyewear, prescription drugs, supplemental health insurance premiums, medical devices and orthotics, ambulance, travel expenses, dental, chiropractic, naturopath, homeopath and other medical treatments, or cost of specialized services required because of a medical or physical impairment. If any of these expenses were covered by insurance, please provide copies of all claims reports issued by the insurer.
- Note 6** Dependant must complete and sign form T2202 if the credit is being transferred to a supporting person.
- Note 7** In some circumstances, **property tax and/or rent paid** results in a claim for Ontario tax credits.
- Note 8** Details regarding **child care expenses** for children 16 & under, including the name of the provider; social insurance number, if an individual; fees for camps, programs and lessons.