

Name	
Address	
Phone	
E-mail	

Please note that all information provided in this memo is only a general guideline to consider and that additional information may be required on a case-by-case basis. If you have any additional information you feel that may be useful for your tax preparation, please include it in your records. If you have any questions, please don't hesitate to contact us.

Please provide the following information if/as it applies to your personal tax situation:

1. Did your marital status change?
2. Did you have any new dependants/children in the tax year?
3. What is your dependant's/children's income?
4. Did you sell a principle residence?
5. Did you own any foreign property costing over \$100,000 CAD at any time during the year? (This can include foreign bank accounts, foreign based shares in your non-registered investment portfolio, real estate, trusts, partnerships, etc.).
6. Did you move to become more than 40 km closer to your place of work or school?
7. All T slips (see the attached tables).
8. All income not reported on tax slips.
9. Investment reports for non-registered accounts (please ensure that you have the Realized Gain/Loss report from your broker if you sold any investments).
10. Any sales or deemed sales of stocks, bonds, or real estate.
11. Management fees paid for non-registered accounts.
12. Interest paid on money borrowed to earn taxable investment income.
13. Instalments made.
14. If you have a spouse or common law partner for whom we do not prepare his/her return, please provide the amount they reported on line 236 of their return.
15. Did you pay or receive spousal and/or child support during the year?
16. Automobile/travel logbook and expenses for related business or sole-proprietor income.
17. Any certifications for Volunteer Firefighters and/or Search and Rescue.
18. Notices of Assessment/Reassessment.
19. Canada Revenue Agency correspondence.

Employment and Commission Income

Commission	T4, T4A
Employment, commission, bonus	T4
Payment from DPSP or profit sharing plan	TRA, T4PS
Severance pay or retirement allowance	T4A
Tips/gratuities, casual wages, or part-time salary	T4, T4A or pay slip showing amount received

Retirement and Disability Income

Canada Pension Plan	T4A(P)
Disability benefits	T4A(P)
Foreign pension income	Foreign reporting slip
Old Age Security	T4A(OAS)
Other pension or superannuation	T4A
RRIF annuity income	T4RIF
RRSP annuity income/withdrawal/home buyers plan	T4RSP, Home Buyers Plan- details on withdrawal and repayment

Other Income

Annuity income	T4A
Canada Savings Bond	T600
Capital gains/losses	T3, T5, broker statements, Realized Gain/Loss report
Declaration of Conditions of Employment	T2200
Dividend income	T5
Employment insurance (EI) benefits	T4E
Farm support payments	AGR-1
Foreign income	Foreign reporting slip
Interest income	T5
Partnership income	T5013
Patronage- UFA / Co-op	T4A
Rental Income	Income and expenses
Royalty income	T5
Scholarships, bursaries	T4A
Statement of Securities Transactions	T5008
Subcontractor	T4A, T5018
Support/separation allowance	Details/agreement
Trust/mutual fund income	T3
WCB/Social assistance	T5007

Self-Employment Income

Business income	Income and expenses
Commission	Income and expenses
Farming or Fishing	Income and expenses
Joint Venture	JV statements
Professional income	Income and expenses

Deductions

Adoption expenses	Receipts/documentation
Alimony / support payments	Details/agreements
Annual union, professional or like dues	T4 or official tax receipts
Carrying charges (accounting, investment exp)	Details/invoice
Child care expenses	Receipts/ SIN if applicable
Clergy residence deduction	T1223
Employment related expenses	Details and T2200
Moving expense	Details/receipts
Northern Residents deductions	Details and T2222
Others	Details
RRSP	Contribution receipts for Mar-Dec of tax year and first 60 days of the following tax year

Tax Credits

Charitable donation credit	Official charity donation receipts
Dependent credit	Details of dependent
Disability Tax Credit (DTC)	Details/T2201
Educator school supply tax credit	List of expenses certified by employer
First-time home buyer tax credit	Proof/details of purchase
Home accessibility tax credit	Receipts
Medical expenses credit	Official medical receipts
Office – in home usage of for business	Receipts, measurements (percentage of)
Political credit (federal or provincial)	Official political donation receipts
Professional certification exams	Receipts
Red Seal tradesman or apprentice mechanic tools credit	Receipts
Spousal credit (if we do not do their return)	Details of net income for spouse (line 236)
Student Loans – interest paid on	Statement from National Student Loans/Alberta Student Aid
Tuition and education credit	T2202, T2202A