



Personal Tax Checklist Page 1

Name: _____ Spouse: _____

If you moved in 202_ provide new address: _____

Do you and your spouse authorize CRA to provide information to Elections Canada? : Yes No

Are you a Canadian Citizen: Yes / No * Spouse: Yes No *

Marital Status: Married / Widowed / Divorced / Common-law / Separated / Single

If marital status has changed during the year, provide date of change (YY-MM-DD): _____

Dependents

DOB	_____	Name	_____	Son or Daughter
DOB	_____	Name	_____	Son or Daughter
DOB	_____	Name	_____	Son or Daughter

Do you, your spouse or any of your dependents qualify for the Disability Tax Credit? Yes No

Have you sold/transferred a real estate property in 202_? (including principal residence) Yes No

If yes, what were the gross sale proceeds? _____ Date _____

INCOME INFORMATION SLIPS

- Employment and Other Income - T4, T4A, T4A(P), T4A(OAS), T4E, T5007
- Do you have any Tips & Gratuities to report? \$ _____
- Investment/Interest (T5, T3, T5013 partnership income, T101)
- Pension Retirement (T4RSP, T4RIF)
- Foreign Slips – Investment/Employment/Pension

Medical Expense Checklist

- Private Health Care Costs/Attendant Care & Group Home (attach receipts)
- Other Dental & Medical (receipts of health plan expense coverages)
- Travel Costs (if over 40 km one way) – provide listing of trips, dates and mileage
- Meals (if travel over 80 km one way) – provide listing of trips, dates and mileage
- Prescriptions – Get a printout from your pharmacist



SJMB Business Services Inc.

Helping You To Achieve Peace Of Mind

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DEDUCTIONS AND CREDITS - IF APPLICABLE ALL RECEIPTS/SLIPS MUST BE PROVIDED

- | | |
|--------------------------|--------------------------------------------------------------------------------|
| <input type="checkbox"/> | RRSP Contributions |
| <input type="checkbox"/> | Union and Professional Dues |
| <input type="checkbox"/> | Donations (charitable/political) |
| <input type="checkbox"/> | Tuition Slip & Exam fees (T2202 – outside of Canada TL11A) |
| <input type="checkbox"/> | Student Loan Interest |
| <input type="checkbox"/> | Child Care (including day/summer camps) |
| <input type="checkbox"/> | Alimony/Maintenance-Exclude Child Support |
| <input type="checkbox"/> | Canada Caregiver Credit (Infirm family member) |
| <input type="checkbox"/> | First Time Home Buyers Credit |
| <input type="checkbox"/> | Volunteer Firefighter Credit (over 300 hours) |
| <input type="checkbox"/> | Moving Expenses – Employment/Business/ Students *See moving expense checklist* |
| <input type="checkbox"/> | Employment Expenses (a signed T2200 must be provided) |