

2014 PERSONAL INCOME TAX RETURN CHECKLIST

PERSONAL DATA:

Name: _____
Address: _____
Home Phone: _____
Business Phone: _____
Business Fax: _____
Email: _____
Employer: _____
Social Insurance Number: _____
Date of Birth: _____
Marital Status (as of December 31, 2014): _____
If your marital status changed in 2014, please provide date of change.

DEPENDENTS: (Include those 65 years of age and over who reside with you)

Name	Relationship	Date of Birth (month/day/year)	SIN
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

DOCUMENTATION:

Attach applicable documentation, if any of the following apply:

- ▶ First Time Home Buyers Credit - proof of purchase required.
- ▶ Employment income (*attach T4*)
- ▶ Commission income (*attach T4*)
- ▶ Other income (*attach T4A*)
- ▶ Old Age Security Pension (*attach T4A(OAS)*)
- ▶ Canada Pension Plan benefits (*attach T4A (P)*)
- ▶ Other pension benefits
- ▶ Employment insurance earnings (*attach T4E*)
- ▶ Dividends from Canadian or foreign corporations (*attach T5*)
- ▶ Interest and other investment income - Canadian and Foreign
- ▶ Income from a Trust or Estate (*attach T3*)
- ▶ Security gains or losses (*attach **all** broker statements and/or a summary with disposition dates*)
- ▶ Alimony payment/receipts
- ▶ Registered Retirement Savings Plan contribution
- ▶ Registered Retirement Savings Plan - Withdrawals (*attach T4RSP*)
- ▶ Registered Retirement Savings Plan - Home Buyers' Plan (*attach T1037*)
- ▶ Tax shelter information (*attach T5013*)
- ▶ Union dues (*attach receipts*)
- ▶ Tuition fees and education deduction forms for self and dependents (*attach T2202*)
- ▶ Child care expenses (*include name, address and SIN of caregiver*)
- ▶ Medical expenses (*attach receipts*)
 - Provide summary of prescriptions for year from drugstore(s)
- ▶ Charitable donations (*attach receipts*)
- ▶ Property tax payments for principal residence (*list to whom paid and amount*)
- ▶ Total rent paid for principal residence (*list to whom paid and amount*)

Rent receipts are required for students

- ▶ Contributions to political parties (*attach receipts*)
- ▶ Personal income tax instalments paid (*list dates paid and amounts*)
- ▶ Receipts for public transit passes
- ▶ Receipts for trades person's tools
- ▶ Receipts for adoption expenses
- ▶ Receipts for child fitness programs
- ▶ Receipts for children's arts tax credit
- ▶ Receipts for healthy homes renovation tax credit

REVENUE/EXPENSE SUMMARIES

Please visit our website at www.trotterassociates.com for schedules that will assist you in compiling information for the following:

- ▶ Commission/employment expenses
- ▶ Automobile expenses for business or employment
- ▶ Home office expenses for business or employment
- ▶ Self employed business income and expenses
- ▶ Rental property income and expenses
- ▶ Details for real estate sold

CARRYING CHARGES (provide receipts)

- ▶ Interest expense for investment purposes
- ▶ Money Management Fees
- ▶ Investment Counsel Fees
- ▶ Student Loan Interest

FOREIGN PROPERTY REPORTING

You are required to report certain information regarding ownership of foreign property. Foreign property includes foreign bank accounts, real estate and equipment, bonds, debentures and shares in non-resident corporations. If you believe you own foreign property and the aggregate cost of all of your total property exceeds \$100,000 Canadian, please indicate "Yes" and we will contact you to discuss the reporting requirements.

I own foreign property the aggregate cost
of which exceeds \$100,000 Canadian:

Yes _____ No _____

U.S. CITIZENS

Are you or your family members
U.S. Citizens?

Yes _____ No _____

If so, who? _____