

Peter A. Kypreos
Accountants & Associates Ltd.
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T1 General Checklist

1. Personal Information: (Please provide the following information for both you and your spouse).

Name: _____ SIN: _____

Address: _____ Date of Birth: _____

Spouse: _____ SIN: _____ Date of Birth: _____

(Please ensure that the following information is attached as applicable and that the appropriate box "☐" is checked.)

- If this is the first year that we are preparing your return, please enclose a copy of your previous returns.
- Please enclose a copy of the Notice Of Assessment from the previous year.

2. Employment Information.

- T4 Statement of Remuneration Paid.
- T2200 Declaration of Employment Conditions completed and signed by your employer.
- Details of other sources of income not included above.

(Please indicate total KM driven and the amount of KM used for business.)

3. Pension Income Information.

- T4A Statement of Pension, Retirement, Annuity & Other Income.
- T4A(OAS) Statement Of Old Age Security.
- T4A(P) Statement Of Canada Pension Plan Benefits.
- T4RSP Statement Of Registered Retirement Savings Plan Income.
- T4RIF Statement Of Income Out Of Registered Retirement Income Fund.

4. Investment Income Information.

(Interest on investments made after 1989 must be reported every year regardless of whether or not you received it during the year).

- T5 Statement of Investment Income.
- T3 Statement Of Trust Income Allocations.
- Details of all investments paying interest, including Canada Savings Bonds.
- Details of all foreign sources of investment income.
- Details of all carrying charges incurred. (Accounting, Interest, Management Fees, Etc....)

5. Capital Gains Information.

- Details on Acquisition or Disposition of all capital property including:
- Proceeds received, terms & date of sale
- Cost of Disposition, if applicable
- Date of acquisition
- Acquisition cost
- Cost of any improvements

6. Rental Income Information.

- Information of any rental income earned or property which has been purchased or sold and expenses.

7. Business Income Information.

- Information relating to all revenues & expenses for all unincorporated business ventures.

8. Other Income Information.

- T4U Statement Of Unemployment Insurance Benefits Paid.
- Details of any alimony or separation payments received.
- Details of any scholarships, fellowships, Bursaries or research grants received.
- Details of any other types of income not reported above.

9. Non-Taxable Income Information. (This is used to determine entitlement to certain credits based on income).

- T5007 Statement Of Worker's Compensation benefits received.
- T5007 Social Assistance received.
- Net Federal Supplements.

10. Deductions.

- TL2 Claim for meals and lodging signed by your employer.
- Automobile Expenses such as: Vehicle cost , Lease costs, Fuel, Repairs, Washes, Insurance, Parking, Auto Clubs & Interest).
- Details of deductible expenses (Showing GST separately) such as: home office expenses & travelling expenses.
- Receipts for contributions made to a Registered Retirement Savings Plan.
- Receipts for withdrawals made from a Registered Retirement Savings Plan.
- Receipts for all child care expenses including name of individual, sin #, if day camp, # of weeks attended and amount.
- Details of any alimony or separation payments made, including name, address & sin # of the recipient.
- Details of all , Tuition Fess, Safety Deposit Box Rental Fees, Union Dues & Professional Dues paid.
- Details of any other expenses that you feel may have an effect on your income tax return not reported above.

11 Personal Credits

- If not provided, spouses income.
- Details of all dependent children, including name, date of birth, nature of infirmity, if born before 1975 and net income.
- T2202 Education Credit Certificate for self and/or children.
- T2201 Disability Credit Certificate.
- Receipts for family Medical Expenses & Charitable Donations.

12. Sundry.

- Receipts for Federal & Provincial contributions.
- Details of all Personal or Business instalments paid.
- Details of property taxes paid on principal residence.
- Details of rental payment made to landlord on principal residence.
- TIC-Hosp (Ontario Home Ownership Savings Plan) contributions.

Other:

Contact us, and Experience the Difference!