

Personal Tax Preparation Checklist

Name:	_____	Spouse:	_____
Address:	_____	Birth Date:	_____ SIN: _____
	_____	Phone: (H) _____	(C) _____
SIN:	_____	Dependent Children: (more than 4 children, please provide details on a separate sheet of paper)	
Birth Date:	_____	Name:	DOB: SIN:
Email:	_____	_____	_____
Phone:	(H) _____ (C) _____	_____	_____
Marital Status:	_____	_____	_____

Please check each box that applies to your 2015 tax situation and provide supporting documentation.

INCOME

- T4 Employment Income
- T4A Other Income (commission, dividends, pension, pension adjustment)
- T4 (OAS) Old Age Security Pension
- T4A (P) Canada or Quebec Pension
- T4RSP/RIF RSP or RIF Withdrawals or Annuities
- T5 Interest or Dividends
- T5008 Securities Transactions
- T5013 Partnership Income
- T3 Trust or Estate Income
- T3 Mutual Fund Income
- Foreign Income (Investment, Pensions, Business, Rental, Employment)
- Rental Income
- Self-employment Income
- Capital Gains or Losses (include date of disposals)
- Alimony/Maintenance Received
- U.S. Social Security

DEDUCTIONS

- Employment Expenses (signed T2200)
- Stock Option Deferral Certification
- Union or Professional Dues
- Medical/Dental Receipts, including premiums
- Tuition Receipts (signed)/Student loan interest
- Donation Receipts
- Child Care Expenses and Receipts
- RRSP Contributions
- Alimony/Maintenance Payments
- Interest/Carrying Charges
- Moving Expenses
- Political Donations
- Changes in Dependents
- Disability Tax Credit
- T1 fees for the previous year (if KTL did not prepare T1)
- Do you care for a relative in your home?
- Public transit passes – at least 7 days
- Trades person's tools
- Children's art expenses (maximum \$500 each)
- Children's fitness expenses (Maximum \$1000 each)
- Other (please attach a detailed note)
- Senior's home renovations

MISCELLANEOUS:

1. Are you a **US CITIZEN** or **GREEN CARD HOLDER**? (**Complete Section A below**).
2. Are you a **Non-US person** and you own **US RENTAL PROPERTY** or have other **US SOURCE INCOME** (**complete section B below**)
3. Do you spend significant periods of time in the USA? : Yes No
If YES, number of days in 2015 _____.
4. (a) Did you own foreign assets during 2015? Yes No.
If YES, and the cost totalled more than \$100,000, please provide a breakdown.

(b) Did you earn income or realize gains for foreign assets in 2015? Yes No. If YES, provide details.
5. Canada Revenue Agency will soon discontinue issuing any kind of cheque and will be depositing refunds and benefit cheques directly to your bank account. If your banking information has not yet been provided to Canada Revenue please provide us with a voided cheque for your bank account.

SECTION 'A' - COMPLETE IF YOU ARE A US CITIZEN OR RESIDENT ('GREEN CARD HOLDER')

	Taxpayer	Spouse
US Social Security Number or ITIN	_____	_____
Occupation	_____	_____
Status in Canada	_____	_____
Date moved to Canada	_____	_____
Purchased or Rental Home	_____	_____
FBAR Required (Total non-US financial accounts exceed \$10,000 US)	<input type="checkbox"/>	<input type="checkbox"/>
Non-US Financial Accounts & Financial Assets Exceed \$200,000 US (Form 8938 required)	<input type="checkbox"/>	<input type="checkbox"/>
Non-US Trust (Beneficiary or Settler)	<input type="checkbox"/>	<input type="checkbox"/>
Non-US Private Corporation Owner	<input type="checkbox"/>	<input type="checkbox"/>
TFSA Accounts	<input type="checkbox"/>	<input type="checkbox"/>
RESP Accounts	<input type="checkbox"/>	<input type="checkbox"/>

SECTION 'B' - COMPLETE IF YOU ARE A NON-US PERSON AND YOU OWN US RENTAL PROPERTY OR HAVE US SOURCE INCOME

	Taxpayer	Spouse
ITIN	_____	_____
Rental Property location (States)	_____	_____
Days Rented	_____	_____
Days of Personal Use	_____	_____
Other US Source Income (List Type)	_____	_____
US Visa or US Status	_____	_____
Days present in US: Current Year (2015)	_____	_____
Prior Year (2014)	_____	_____
2 nd Prior Year (2013)	_____	_____