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Practicing Through  
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## **Personal Tax Planning Checklist**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
SIN: \_\_\_\_\_  
Birth Date: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone: (H) \_\_\_\_\_ (C) \_\_\_\_\_  
Marital Status: \_\_\_\_\_

Spouse: \_\_\_\_\_  
Birth Date: \_\_\_\_\_ SIN: \_\_\_\_\_  
Phone: (H) \_\_\_\_\_ (C) \_\_\_\_\_  
Dependent Children:  
Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SIN: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please check each box that applies to your 2014 tax situation and provide supporting documentation.**

### **INCOME**

- ☐ T4 Employment Income
- ☐ T4A Other Income (commission, dividends, pension, pension adj.)
- ☐ 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 and Expenses
- ☐ Self-employment Income and Ex
- ☐ Capital Gains or Losses (include Dates of Disposals)
- ☐ Alimony/Maintenance Received
- ☐ U.S. Social Security

- ☐ 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
- ☐ Living Common-law
- ☐ Disability 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
- ☐ Children's fitness expenses
- ☐ Other (please attach a detailed note)

### **DEDUCTIONS**

### **MISCELLANEOUS:**

1. ☐ 2014 Instalments forms ☐ 2014 Assessment Notice ☐ Business Income Expenses
2. Do you own non-RRSP mutual funds: ☐ Yes ☐ No If yes, please provide 2014 investment statements (non-RRSP only)
3. Do you spend significant periods of time in the USA: ☐ Yes ☐ No If Yes, approximate time in 2014 \_\_\_\_\_
4. If you would like to have all Government tax or Child Tax Benefits deposited directly to your bank account, please check here ☐ and enclose a voided cheque for your bank account.
5. (a) Did you own foreign assets during 2014: ☐ Yes ☐ No If yes, and the cost totaled more than \$100,000 please provide a breakdown.  
(b) Did you earn income or realize gains for foreign assets in 2014? ☐ Yes ☐ No If yes, provide details.  
(c) Did you receive property or funds (including a loan) from a non-resident trust in 2014? ☐ Yes ☐ No If yes, provide details.