2015 Personal Income Tax Checklist

In order to assist us in preparing your 2015 Personal Income Tax return(s) kindly complete the following:

Personal Information:

Name _____
Name _____
Name _____
Name _____

Marital Status:

☐ Same as last year
☐ Changed as of *(date):* _____

New marital status *(if applicable)*:

Married ☐ Common-law ☐
Separated ☐ Divorced ☐
Widowed ☐ Single ☐

Dependant Information:

☐ Same as previous year
☐ New *(please complete chart)*

Address: ☐ Same as last year
☐ New *(please complete)*:
_____
_____
_____

Contact Information:

Home Phone: _____
Business Phone: _____
Cell Phone: _____
Email: _____

Preferred Contact Method:

Home Phone ☐ Business Phone ☐
Cell Phone ☐ Email ☐

Name	Date of Birth	SIN	Relationship	Net Income	Return to Be Prepared
					☐ Yes ☐ No
					☐ Yes ☐ No
					☐ Yes ☐ No
					☐ Yes ☐ No

Are you a Canadian Citizen? ☐ Yes ☐ No

If yes, do you authorize Canada Revenue Agency to give your name, address, date of birth and citizenship to Elections Canada to update the National Register of Electors? ☐ Yes ☐ No

Did you own foreign property at any time in 2015 with a cost of over $100,000 CDN? ☐ Yes ☐ No
(If yes, attach details of such property)

Do you wish us to Efile your personal tax return to Canada Revenue Agency? ☐ Yes ☐ No

Continued on Reverse…

HEHN TRICKEY
Professional Corporation
(705) 325-0094

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Please include the following information for each taxpayer:
(If applicable, please check box (✔) if the information is included)

☐ **Copy of 2014 Notice of Assessment and prior years' Reassessment Notices** *(if applicable)*

All income information slips

Employment	☐ **T4** ☐ **T4A**	Canada Pension Plan	☐ **T4A (P)**
Universal Child Care Benefit	☐ **RC62**	Employment Insurance	☐ **T4E**
Partnership income	☐ **T5013**	Income from RRSP	☐ **T4RSP**
Pension payments from employer	☐ **T4A**	Income from RRIF	☐ **T4RIF**
Interest and dividends	☐ **T5**	Purchase and sale of securities	☐ **T5008**
Mutual fund and other trusts	☐ **T3**	Social assistance, WSIB	☐ **T5007**
Old Age Security	☐ **T4A (OAS)**	Other (specify)	☐ _____

All official receipts:

RRSP contributions, including first 60 days of 2016	☐	Disability credit	☐ **T2201**
Charitable donations	☐	Education credit	☐ **T2202/2202A**[1]
Political donations	☐		
Professional dues	☐		

[1]*If receipt is from a dependant, please have dependant sign in appropriate place on the form (reverse). If we are not completing dependant's return, please complete the income portion of the form*

☐ **Self-employment income and expenses** (*Include HST/GST information, if possible)*

☐ **Rental property income and expenses**

☐ **Details of employment expenses** *(Employees must attach form T2200 signed by their employer)*

Other items:

☐ **Support/alimony payments** *(Please include amount paid or received, the name, address and SIN of payee or recipient, and the date of support agreement)*

☐ **Child care expenses** *(Please include receipts)*

☐ **Children's expenses up to $1,000 - fitness and arts programs** *(Please include receipts for expenses paid in 2015 for children 16 and under.)*

☐ **Moving expenses**

☐ **Medical expenses** *(Please include official receipts)*

☐ **Property taxes or rent paid in the year** *(Please include the number of months at each location, the address of each location and to whom the amounts were paid, i.e. landlord, municipality)*

☐ I**nstalment payments made during the year** *(Please include year end statement from CRA)*

☐ **Void cheque for direct deposit if desired, unless already registered** *(Please indicate the payments you wish to be direct deposited [tax refund, OAS and/or CPP])*

☐ **Ontario Healthy Homes Renovations Tax Credit** *(You may be eligible if you are 65 or older or living with someone who is 65 or older and have done improvements to your home to improve the safety and accessibility of your home. Please contact us for more information.)*

☐ **Carrying charges and interest paid to earn income from investments**

☐ **Interest paid on student loans**

☐ **Public transit pass expenses**

☐ **Tradesperson's tools expenses**

☐ **Details of disposition of stocks, bonds and mutual funds.** *(Please include investment broker monthly statements and year end summaries provided by broker)*

☐ **Disposition of real estate** *(Please include original cost, proceeds on sale, purchase date, sale date, ownership)*

☐ **Foreign pension income** *(Please include the amount received in Canadian dollars and from which country the pension is received)*

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