

MITCHELL & PEARCE

PROFESSIONAL CORPORATION

Chartered Professional Accountants

PERSONAL INFORMATION			
		SIN	Date of Birth
Name			
Name of Spouse			
Change of name		Name:	
Change of marital status (day and month of change)		Status:	Date:
			Born in 2011?
Name of Dependants	1.		
	2.		
	3.		
	4.		
Address	Apt. #		
Street	City		
Province	Postal Code		
Telephone: Home ()	Telephone: Office ()		
Is Your Address New This Year?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Date of Departure from or Entry to Canada if Within Tax Year:			
Date of Marriage if Within Tax year			
Date of Separation or Divorce if Within Tax Year			
Date of Death			
Date of Dependant's Birth if Within Tax Year			
Province of Residency on December 31			
INCOME (INCLUDE T3s, T4s, T4As, T5s, T600s and Invoices)			
	You	Spouse	Info. Required
Salaries and Wages			Enclose T4 slips
Gratuities & Tips			Amount \$ _____
CPP			Enclose T4A-P slips
OAS			Enclose T4A-OAS slips
Pensions			Enclose T4A slips
Employment Insurance Benefits received			Enclose T4E slips
Universal Child Care Benefit			Enclose RC 62
Interest and Dividends (Canadian and Foreign)			Enclose T5 slips
Investment Income (estates, trusts, mutual funds)			Enclose T3 slips
RRSP withdrawals			Enclose T4RSP slips
RRIFs			Enclose T4RIF slips
Spousal Support received (name, address, S.I.N. of payer)			Amount \$ and details
WSIB benefits			Enclose T5007 slips
Social assistance			Enclose T5007 slips
Scholarships			Enclose T4A slips
Self-employed income (business, professional)			List income & expenses
Rental Income (per property)			List income & expenses
US Income			Attach documents

This checklist is of a general nature and is not intended to include all sources of income or allowable deductions.

Please inform S J Mitchell of any relevant information.

Capital Gains and Losses	You	Spouse	Info. Required
Sale of real estate, stocks, mutual funds			Enclose description
Proceeds on sale			Canadian \$ amount
Date of Sale			Day and month
Expenses of sale (legal and commissions)			Provide details
Purchase price (including legal fees and commissions)			Canadian \$ amount
Date of purchase			Month and year
Deductions/Credits	You	Spouse	Info. Required
RRSP contributions			Attach receipts
Union, professional or like dues			Attach receipts
Child care expenses (name, address, S.I.N. of caregiver)			Amount \$ and details
Attendant care expenses			Amount \$ _____
Moving expenses (provide details of relocation)			Attach list of expenses
Spousal/Child Support paid (name, address, S.I.N. of recipient)			Amount \$ and details
Expenses related to adoption			Provide details
Any tools purchased for work			Enclose receipts
Interest paid on investment loan(s)			Amount \$ _____
Employment Insurance Benefits repaid			Enclose slip
Safety deposit box rental			Amount \$ _____
Investment counsel fees			Amount \$ _____
Employment expenses (auto, meals, promotion, etc.)			List expenses & T2200
Weekly/Monthly public transit passes			Enclose receipts
Childrens' Activity Tax Credit			Enclose receipts
Significant physical disabilities			Provide details
Tuition fees and education amount			Enclose T2202
Book tax credit			T2202/T11A
Medical expenses/Private health service plan premiums			Enclose receipts
Charitable donations			Enclose receipts
Does your parent/grandparent reside with you?			Provide name and age
O.S.A.P student loans-interest paid			Enclose receipts
Political contributions			Enclose receipts
Rent paid (address, landlord, # months per location)			Enclose receipts
Property taxes paid (address and payee i.e. city)			Amount \$ and details
Volunteer Firefighter Tax Credit			Enclose certification of hrs
Other Information	You	Spouse	Info. Required
Tax Installments paid			Enclose final statement
RRSP Home Buyers' Plan (withdrawal/repayment)			Provide details
Transfers to Spouse on Separation			
Property that you transferred			Provide details
Transfer Date			Provide details
Separation Agreement Date			Provide details