



Integrated Solutions inc.
Personal Income Tax Return Check List
 250-716-1438 or e-mail integratedsolutions@shaw.ca

Please fill out the following information to the best of your knowledge. If you have any questions please do not hesitate to contact me. Gather all your receipts and get them to me as soon as conveniently possible, that way you'll get your refunds quicker. Please include a copy of your previous year's CRA T1 Assessment.

Personal Information:

	You	Your Spouse
Name:		
Address:		Same as Spouse: <input type="checkbox"/>
City / Code:		
Phone:		
e-mail:		
SIN:		
Birth Date DD / MON / YEAR		
Marital Status: as of 31 st Dec. <i>Has status changed? If so, what was the date of change?</i>	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widow <input type="checkbox"/> Common-Law <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <i>Date Changed:</i>	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widow <input type="checkbox"/> Common-Law <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <i>Date Changed:</i>

If you are married or living common-law and I am not preparing your spouse's return, please provide the following information:

Name: _____ SIN #: _____ DOB: _____

Net Income (Line 236): _____

Dependents:

	1	2	3
Name			
Birth Date			
Relationship			
SIN #			
Net Income?			

Additional Dependents? Attach information on a separate sheet.

Slips and Supporting Documents

Please read through the following list and check all that apply to you (and your spouse, if applicable). Be sure to include all corresponding slips and documents.

Income Items

- T4- Statement of Remuneration Paid
- T4A - Pension, Annuity and Other
- T4A(OAS) - Old Age Security
- T4A(P) - Canada Pension Plan
- T4RSP- RRSP Income
- T4RIF - RRIF Income
- T4E - Employment Income
- T3 - Trust Income Allocation
- T5 - Investment Income
- T5008 - Securities Transactions
- Foreign Pensions or US Social Security
- Gratuities: _____
- RHP - Registered Homebuyer's Plan
- payment made or income inclusion?

Deductible Items

- Public Transit Passes - attache receipts
- Children's Fitness Credit Receipts
- RRSP Contribution Receipts
- Investment Expenses / Carrying Charges
- Tradesperson Tools and Expenses
- Medical Expenses Receipts - Please see details below for allowable expenses
- Premiums paid for EXH or Dentals Benefits
- Charitable Donations Receipts
- T2202A- Tuition Fees of more than \$100
- T2201 - Student Loan Interest Forms
- T2200-Required for Employment Expenses
- Volunteer Fireman Amount - Letter required
- Contributions to Federal and Provincial Political Parties

Other Documents or Deductions

- Assisted Living? The facility should provide you with the breakdown information - allowable deductions for medical expenses includes:
 - food preparation costs;
 - housekeeping services for resident's personal living space;
 - laundry services for resident's personal items;
 - health care (registered nurse, practical nurse, certified health care aide, personal support worker);
 - activities (social programmes);
 - transportation (driver); and
 - security for a secured unit
- Income and expenses from rentals, business or partnership.
Those with a Rental or Business Schedule, please contact me if you're not sure of what expenses can be included, including in-home expenses.
- Include details on alimony / maintenance received or paid
- Attach Assessment Notices and correspondence from Canada Revenue Agency
- Include CRA Notices for any tax paid by instalments
- Allowable Medical Expenses include, please include all receipts
 - prescriptions
 - eye exams
 - glasses / contacts
 - chiropractor
 - physiotherapy
 - natural path
 - specialists appointments or other out of pocket expenses
 - appointments more than 80km from home (return), such as Vancouver or Victoria, call me for more details

Personal Tax Checklist:

Who Receives the Canada Child Benefit (CCB)?	
Did you pay childcare expenses in the current tax year? If yes, please attached details and receipts	Yes <input type="checkbox"/> No <input type="checkbox"/>
As a single parent, did the dependant child / children live with the taxpayer at any time during the year? Or do you have shared custody, and if so, what are the details?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you, and any other family member, eligible for the Disability Tax Credit?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did you own foreign property at any time in the current tax year with a total cost of more than \$100,000 CAD? If yes, please attach details	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you authorize Canada Revenue Agency to provide your name, address, and date of birth to Elections Canada for the National Register of Electors?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Sale of principal residence after 01 Jan 2016? You'll NOW need to provide basic information: date of acquisition, proceeds of disposition and description of the property - in order to claim the full principal residence exemption.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible for MSP Premium Assistance? Complete form at http://www2.gov.bc.ca/assets/gov/health/forms/119fil.pdf	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>Do you want to start or change Direct Deposit of refunds into your bank account? This includes income tax refunds, GST/HST Credits, Canada Child Tax Benefits, or Universal Child Tax Benefits. If yes, please provide the following, or provide a void cheque:</p> <p>Bank / Credit Union: ___ ___ ___ ___ ___</p> <p>Institution Number: ___ ___ ___</p> <p>Account Number: ___ ___ ___ ___ ___ ___ ___ ___ ___ ___</p>	

Anything Else? Please document any other pertinent information and attached to this check list.

Any questions, do not hesitate to contact me.

Wendy McQueen
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