

LOCKWOOD DOYLE PROFESSIONAL CORPORATION

PROFESSIONAL ACCOUNTING | TAX SERVICES

2011 Personal Income Tax Checklist

Personal details for you and your spouse

- Name
- Social Insurance Number
- Date of birth
- Address
- Citizenship (if not Canadian)
- Primary contact telephone numbers
- Email address

If your marital status changed during the year, provide date of change.

Details of any dependants

- Name
- Social Insurance Number
- Date of birth
- Relationship to you
- Number of months lived in your household
- Net income

Prior tax information

- Copy of prior year Tax Return submitted (for new clients only)
- Prior year government notice of assessment from CRA

If you owned foreign property with a total cost of more than CAD \$100,000 at any time in the year:

- Type of property
- Cost
- Location

LOCKWOOD DOYLE PROFESSIONAL CORPORATION

PROFESSIONAL ACCOUNTING | TAX SERVICES

Income

<i>Type of income</i>	<i>Supporting documentation</i>
<input type="checkbox"/> Salaries, wages, commissions, fees,	T4, T4A
<input type="checkbox"/> Pensions, retirement	T4A, T4A(P), T4A (OAS) T4RIF
<input type="checkbox"/> E.I. benefits	T4U
<input type="checkbox"/> Investment income (interest, dividends, trust income, etc)	T5, T3
<input type="checkbox"/> Income from Registered Retirement Savings Plan	T4RSP
<input type="checkbox"/> Rental income	SEE SEPARATE RENTAL INCOME CHECKLIST
<input type="checkbox"/> Business and self-employment income	SEE SEPARATE BUSINESS INCOME CHECKLIST
<input type="checkbox"/> Other income (e.g. scholarships, alimony payments, etc)	Details of amounts received and T4A where applicable

Expenses & deductions

<i>Type of expense</i>	<i>Supporting documentation</i>
<input type="checkbox"/> Allowable employment expenses (e.g. automobile, travel, etc)	Details of amounts paid T2200 signed by employer
<input type="checkbox"/> Registered Retirement Savings Plan contributions	Official receipts
<input type="checkbox"/> Charitable donations	Official receipts
<input type="checkbox"/> Union and professional dues	Official receipts
<input type="checkbox"/> Tuition fees	Official receipts, T2202A
<input type="checkbox"/> Medical expenses (for any 12 month period ending in the calendar year)	Official receipts and details of total paid for health insurance premiums and any reimbursements from medical plans
<input type="checkbox"/> Childcare expenses	Receipts for payments, including name, address and SIN# of payee(s)
<input type="checkbox"/> Moving expenses (if job related and at least 40km)	Details of expenses
<input type="checkbox"/> Alimony, child support or separation allowance paid	Details of payments, including name, address and SIN# of recipients
<input type="checkbox"/> Investment expenses and carrying charges (e.g. interest, investment counsel fees, safety deposit box fees, etc.)	Details of expenses



LOCKWOOD DOYLE PROFESSIONAL CORPORATION

PROFESSIONAL ACCOUNTING | TAX SERVICES

Capital gains and losses

- Details of assets sold during the year (e.g. stocks and bonds not held in RRSP's, real estate, equipment, etc), including dates of sale and purchase, and original cost.