

Matrix Financial Services

Income Tax Checklist

Personal Details

(If first time filing, please provide all given names)

Name: _____

Spouse/Common-law partner: _____

Social Insurance Number: _____

Social Insurance Number: _____

Date of Birth: _____

Date of Birth: _____

Marital Status/Date of change: _____

Email: _____

Address: _____

Home Phone: _____

Work Phone: _____

Cell Phone: _____

<u>Dependant's Name</u>	<u>Relationship</u>	<u>Date of Birth</u>	<u>Net Income</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Are you a Canadian citizen? Yes No

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

Income

Yes No Please Provide...

Did you have employment or commission income?			T4 & T4a Slips and details of other income not on slips
Did you receive Employment Insurance benefits?			T4E slip
Did you receive Social Assistance or Workers' Compensation?			T5007 slips
Did you receive payments from an Estate or Trust?			T3 slips
Did you receive Old Age Security benefits?			T4(OAS)
Did you receive Canada Pension Plan benefits?			T4A(P)
Did you withdraw from an RRSP, RRIF, or FHSA?			T4RSP/T4RIF/T4A/T4FHSA slips
Did you receive Canadian dividends or interest?			T5 slips
Did you have income from sources outside Canada?			Slips or Details
Did you have rental, business or farming income?			Details of Income & Expenses
Did you receive proceeds from the sale of real estate, stocks, bonds or the redemption of mutual funds?			Description of assets, year of acquisition, date and proceeds of disposition

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Tax Deductions	Yes	No	Please Provide...
<i>Did you contribute to an RRSP or an FHSA?</i>			<i>Contribution receipts</i>
<i>Did anyone in your family attend college/university?</i>			<i>Form T2202A/T2202 slip signed by student</i>
<i>Did you pay interest on your student loan?</i>			<i>Interest statements</i>
<i>Did you pay union or professional dues?</i>			<i>Tax receipts</i>
<i>Did you incur arts or fitness expenses for children under 18?</i>			<i>Details & receipts</i>
<i>Did you incur moving expenses?</i>			<i>Details of the move</i>
<i>Did you pay or receive spousal support based on a court order or written agreement?</i>			<i>From or to whom, SIN, address, amount</i>
<i>Did you pay for child care? (Includes summer camp)</i>			<i>Official receipts & details</i>
<i>Did you incur expenses to earn investment income? (Interest, investment counsel fees, etc)</i>			<i>Details & receipts</i>
<i>Did you make any charitable donations?</i>			<i>Official receipts</i>
<i>Did anyone in your family become disabled?</i>			<i>Form T2201, Caregiver Tax Form, completed by doctor</i>
<i>Did you pay medical premiums or medical expenses for which you were not reimbursed?</i>			<i>Details & receipts</i>
<i>Were you required to work at home by your employer?</i>			<i>Form T2200 completed by your employer Details of expenses/number of days worked from home</i>
<i>Did you incur any vehicle or business expenses as an employee?</i>			<i>Form T2200 completed by employer and vehicle mileage log</i>
<i>Did you purchase any tradesman's or apprentice mechanic's tools?</i>			<i>Receipts</i>
<i>Did you support or provide in-home care for a family member over the age of 65?</i>			<i>Details and income of person receiving care</i>
<i>Did you purchase your first home in Canada?</i>			<i>Details</i>

Other	Yes	No	Please provide...
<i>Did you pay any federal tax installments other than those amounts deducted from pay cheques or slips?</i>			<i>Amount, receipts, and latest CRA statement of account</i>
<i>Did you withdraw funds from an RRSP during the year, or in a prior year, for the Home Buyer's Plan</i>			<i>Details</i>
<i>Do you have a spouse or dependant whose tax return is being prepared elsewhere?</i>			<i>Details of spouse or dependant's income</i>
<i>Did you pay property taxes or rent during the year?</i>			<i>Tax bill or rent receipt & name of landlord</i>