

# 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...

Did you contribute to an RRSP or an FHSA?			Contribution receipts
Did anyone in your family attend college/university?			Form T2202A/T2202 slip signed by student
Did you pay interest on your student loan?			Interest statements
Did you pay union or professional dues?			Tax receipts
Did you incur arts or fitness expenses for children under 18?			Details & receipts
Did you incur moving expenses?			Details of the move
Did you pay or receive spousal support based on a court order or written agreement?			From or to whom, SIN, address, amount
Did you pay for child care? (Includes summer camp)			Official receipts & details
Did you incur expenses to earn investment income? (Interest, investment counsel fees, etc)			Details & receipts
Did you make any charitable donations?			Official receipts
Did anyone in your family become disabled?			Form T2201, Caregiver Tax Form, completed by doctor
Did you pay medical premiums or medical expenses for which you were not reimbursed?			Details & receipts
Were you required to work at home by your employer?			Form T2200 completed by your employer Details of expenses/number of days worked from home
Did you incur any vehicle or business expenses as an employee?			Form T2200 completed by employer and vehicle mileage log
Did you purchase any tradesman's or apprentice mechanic's tools?			Receipts
Did you support or provide in-home care for a family member over the age of 65?			Details and income of person receiving care
Did you adopt a child?			T101/102 slips
Did you purchase your first home?			Details

### Other

Yes

No

Please provide...

Did you pay any federal tax installments other than those amounts deducted from pay cheques or slips?			Amount, receipts, and latest CRA statement of account
Did you withdraw funds from an RRSP during the year, or in a prior year, for the Home Buyer's Plan			Details
Do you have a spouse or dependant whose tax return is being prepared elsewhere?			Details of spouse or dependant's income
Did you pay property taxes or rent during the year?			Tax bill or rent receipt & name of landlord